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FOOD CHAINS IN CANADA 1930

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FOOD CHAINS

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FOOD CHAINS

INTRODUCTION

This report on the operations of food chains is one of a series of reports presenting detailed analyses of the activities of retail chains during the year 1930. This series is intended to supplement the summary report on chain stores that has already been published by analysing in greater detail the activities of chains in those merchandising fields where the amount of business conducted by chain organizations was large enough to warrant a special analysis. The food chains analysed in this report are grocery chains, combination store chains (those selling both groceries and meats) and meat market and fish market chains. The figures given herein cover the trading operations of these chains during 1930 and they were obtained in connection with the Census of Merchandising and Service Establishments, which formed part of the Seventh Decennial Census.

The 44 grocery chains shown in this report operated 749 stores and had total net sales of $45,043,653. There were 23 organizations classified as combination chains and these operated 1,379 stores and did a total business of $74,800,139. It must be borne in mind, however, that these combination chains operated a great many straight grocery stores in addition to those selling both groceries and meats, so that the amount just quoted greatly exceeds the sales made through chain units of the combination type. From Table 1(b), it will be seen that of the 1,379 stores operated by combination chains, 665 were straight grocery units, with sales of $23,478,835; 698 stores handled both groceries and meats, with sales of $51,011,609; and 16 were meat stores, having sales of $309,695. For the general retail reports, each of these stores was classified independently according to its own kind of business. For this report, it has been necessary to classify each chain in its entirety, and a chain has been classified as a combination chain when at least 25 per cent of its business was conducted in stores of the combination type. There were 20 meat market chains and one fish market chain, having a combined total of 225 units and sales of $8,447,682.

Chains Defined

For this Census, a group of four stores or more under the same ownership and management and carrying on the same or similar kinds of business, has been classified as a chain. Groups of two or three stores owned and operated by one proprietor or firm have been classified as two- or three-store multiples - not as chains - and are reported under these headings in the provincial retail reports. So-called voluntary chains, in which the stores are individually owned and operated, but are grouped for buying and/or advertising purposes, are not considered as chains, but figures for these stores have been shown separately in the provincial retail reports. Chains have been classified as local, provincial, sectional and national, depending upon the extent of territory in which their branches are situated. Local chains are located entirely, or almost so, within the same town or city. Provincial chains are located within one province. The units of sectional chains are spread over two or three provinces, while national chains have stores in four provinces or more.

Operating Expenses

The 44 grocery chains had a total operating expense of 11.47 per cent of sales, of which payroll was 5.58 per cent. Rent paid for leased premises amounted to 1.85 per cent of sales made in such premises.

The ratio of total operating expenses to sales for the 23 combination chains was 17.39 per cent, of which payroll was 8.52 per cent. Rental cost to sales in leased premises was 2.65 per cent.

Total operating expenses of the 21 meat market chains was 20.94 per cent of net sales, of which payroll was 10.80 per cent and the ratio of rent to sales in leased premises was 2.70 per cent.

Central Office Expenses.- Partial information only was received regarding head office salaries and wages and other overhead expenses, although the forms sent out asked that this be separately reported. Where the overhead expense has been furnished, it was prorated over the individual stores on the basis of sales. Chain store warehouses were considered as wholesale establishments for this Census and have been included in the wholesale reports. Expenses in connection with these warehouses are, therefore, omitted from this report. In a number of cases, the head office of a chain organization is operated as a department of the warehouse, rather than as a separate unit, so that in these cases head office expenses would be included in the warehouse returns.

In addition to the amounts paid in salaries and wages and rental costs, total operating expenses includes such items as taxes, insurance, maintenance, delive from stores, stationery and supplies, light, heat, power, interest on money borrowed for current business operations, and any other operating expense. The cost of goods purchased for resale was, of course, excluded, as well as any items on capital accoun Where wide discrepanices were found to exist in individual returns, the expense items were checked in order to avoid including any items which would materially affect the results. Due to the lack of uniformity in accounting practices, however, these operating expense ratios should only be considered as indicative of the costs of operation of these chains, although they are thought to be sufficiently accurate to justify the analysis given in this bulletin. In Table IV, these chains are analysed according to rental costs, showing that in the case of grocery and combination chains a low rental cost is a feature of chains having high average sales per store and low total operating expenses.

Growth of Chains

Of the 2,218 units of grocery, combination, and meat chains which could be classified as to date of ownership, 336, or 15.1 per cent, were established in 1930; 1,168, or 52.6 per cent, were opened during the years 1926 to 1929; and the remaining 32.3 per cent were in operation prior to 1926. The greatest expansion in these food chains took place in 1929, when 464 new branches, approximately 20 per cent of the total number in operation in 1930, were opened, of which 154 were located in Ontario.

Geographic Distribution

Of the 2,353 stores analysed in this report, 1,107, or approximately 45 per cent, were located in Ontario and 495, or 20 per cent, were in Quebec. There were 406 units in the Prairie Provinces, 244 in British Columbia, and 99 in the Maritimes. Of the total sales of $128,291,474 made through these chain stores, Ontario accounted for $71,133,271, or over 55 per cent, and Quebec for $23,708,363, or approximately 18.5 per cent, of the total of all food chain sales. Table III shows the distribution of sales in each province and further analyses the data according to size of city. Of the total sales of food chains in Canada shown in this report,

44.56 per cent were made in cities of 100,000 population or over, and only 4.11 per cent is attributable to places of less than 1,000 population.

Credit Sales

Credit sales made by food chains are shown in Table I. Of the 44 grocery chains, 12 having total sales of $3,195,529 reported that they extended credit. These credit sales amounted to $705,963, or 22.09 per cent of the sales of these chains. Twenty-six chains, having total sales of $38,239,134, reported that they sold only for cash, while 6 smaller chains did not report their credit activities. Eleven of the 23 combination store chains reported that they sold on credit. While the total sales of these 11 chains amounted to $30,791,236, or over 41 per cent of the total sales of all combination chains, some of them reported but a small credit item, so that credit sales amounted to but 3.94 per cent of the total sales of those extending credit. Six chains, with total sales of $41,391,194, reported that they sold only for cash, and 6 chains failed to indicate whether they sold for credit or not.

Of the 21 meat chains, 11 doing 73 per cent of the business of all meat chains, reported credit sales. Credit sales of these chains amounted to 51.4 per cent of their total business. Eight chains, with sales of $2,082,929, reported that they sold only for cash, and three chains did not answer this part of the questionnaire.

Grocery Chains

The 44 grocery chains analysed in this report, and operating 749 stores with sales of $45,043,653, had an average operating expense ratio of 11.47 per cent of net sales. Grocery chain operating expenses have been analysed in Table V. The chains are first classified according to type of operation, then according to the number of units operated, then according to total sales volume, and finally by average sales per store. When analysed according to number of units operated, it is found that the larger chains having more than 50 units, had the lowest expense ratio, 10.45 per cent of net sales, as compared with 14.18 per cent for chains having from 6 to 10 units, and 13.66 per cent for chains having 4 or 5 stores. When classified according to average sales per store, it is seen that chains whose average annual sales per store exceeded $60,000, had an operating expense ratio of 10.46 per cent of net sales, as compared with 14.15 per cent for chains whose average annual sales per store were less than $30,000. In a great many cases, branches of chains were opened during the year 1930, so that in classifying the chains according to average sales per store, it was necessary to make an allowance for this factor by attributing to each chain the average number of stores in operation during the twelve months.

Commodities Sold by Grocery Chains.- Of the total sales of grocery chains amounting to $45,043,653, approximately 74 per cent could be analysed according to commodities sold. Over 78 per cent of the sales analysed were general groceries: fresh fruits and vegetables accounted for 6.46 per cent, and household supplies, including soap, amounted to 5.66 per cent. The percentage for general groceries has been further analysed in Table VI, showing that sales of sugar amounted to 7.76 per cent of the total sales of grocery chains; butter and cheese, 13.63 per cent; and eggs, 4.25 per cent.

Combination Store Chains

The 23 combination store chains, with 1,379 stores and $74,800,139 net sales, operated on an average expense ratio of 17.39 per cent of sales. Of the total number of stores, 14.9 per cent were opened during the year 1930, the greatest percentage of growth being among the smaller chains of from 6 to 10 units. Operating expenses of these chains have been analysed in Table VII in a similar manner to those of grocery chains. It should be remembered, however, that these chains operated varying numbers of straight grocery stores as well as stores of the combination type. Since the operating expense of a combination store is greater than that of a grocery unit, this factor should be kept in mind when considering the expense ratios given in this report. When classified according to number of units operated, the lowest operating expense was obtained by chains operating between 11 and 100 stores. These chains had an expense ratio to sales of 16.07 per cent, while both the larger chains having more than 100 units, and the small chains with ten stores or less, had somewhat higher figures.

Commodities Sold by Combination Chains.- Of the total sales of all combination store chains, 53.87 per cent represented the sale of groceries. The sale of meats amounted to 22.57 per cent, and fruits and vegetables, 11.11 per cent. The sales of other commodities are given in Table VIII and the total grocery item just given is also further analysed. It must be remembered, of course, that not all the stores in these combination chains sold meat: some were straight grocery stores, while a few were purely meat markets. Thus, it is not correct to assume that 22.57 per cent was the average ratio that the sales of meat bore to the total sales of a typical chain unit of the combination type, where both groceries and meats were sold. The proportion of meats sold in a combination store is considerably in excess of that figure. These commodity percentages are based upon the total sales of all combination chains reporting sales by commodity classes, irrespective of the kinds of stores operated. Thus, while the percentages given in Table VIII may be used to determine the total sales of commodities sold by combination chains, they do not represent the average commodity sales percentages for either combination stores or grocery stores.

Meat Market Chains (Including Fish Markets)

The 21 meat market and fish market chains operated 225 stores and had total net sales of $8,447,682. Total operating expense for all chains amounted to 20.94 per cent of sales. Chain operating expenses have been analysed in a similar manner to those of grocery and combination chains, but these percentages are heavily weighted by the expenses of one large firm. The lowest operating expense ratio is found to coincide with the highest average sales per store and is greatest for small chains whose total sales are less than $100,000. Rental costs also vary more or less inversely with average sales per store.

Commodities Sold by Meat Market Chains.- Of the total sales of meat and fish market chains, 84.88 per cent represents the sale of meats and poultry. Butter and cheese were next in importance, with sales of 7.97 per cent of the total. The sale of eggs amounted to 3.40 per cent, and of fish to 1.81 per cent, while the remainder, or 1.94 per cent, was comprised of the sales of miscellaneous food products. The commodities sold by meat market chains are analysed in Table X.

Middle Range Figures

The expense figures given in the preceding paragraphs, and shown in Tables I, V, VII and IX, were obtained by totalling the expense data given for each chain and expressing this total as a percentage of the total sales of the same companies. That is to say, these are weighted averages in which a large chain has more weight in determining the expense ratio for the group than a smaller organization. In Table XI, average operating figures are given for the three types of chains analysed in this report, in which each chain has been given the same weight irrespective of its size. Using this method, it is found that the average total operating expense for grocery chains was 13.62 per cent of net sales, as compared with 11.47 per cent as obtained by the other method. Average operating expenses for combination store chains amounted to 16.70 per cent of sales, and for meat market chains, 19.36 per cent, as compared with 17.39 per cent and 20.94 per cent respectively, using the first method. Upon referring to Table XI, it will be seen that three values are given for total operating expenses in each case under the headings: "Lower Limit of Middle Range", "Average of Middle Range", and "Upper Limit of Middle Range". The method of obtaining these three figures for total operating expense will be explained.

The total operating expense (including salaries, rent and other expenses) for each chain was expressed as a percentage of its total sales. These percentages were arranged in ascending order of magnitude. The series was then divided into three ranges: the lower range, consisting of the lower quarter of the figures; the upper range, consisting of the upper quarter of the figures; and the middle range, containing the remaining half of the figures. The average of the middle range was then found. Thus, after omitting the extremely high and low figures, due in most instances to exceptional circumstances, the remaining items were given equal weight in obtaining an average operating expense ratio for the group. The "Lower Limit of the Middle Range" and "Upper Limit of the Middle Range" are, of course, the two values at either end of the middle group of figures.

Upon referring to Table XI, it will be seen that the lower limit of the middle range for total operating expenses of grocery chains was 11.59 per cent, the upper limit was 15.71 per cent, and the average of the middle range was 13.62 per cent. Or, in other words, one-quarter of the grocery chains had a total operating expense ratio of less than 11.59 per cent of sales, one-quarter of the chains had a total expense ratio of more than 15.71 per cent of sales, and one-half of the grocery chains had an expense ratio lying between these two figures and centering around 13.62 per cent. The other items in this table were obtained in a manner similar to that used in the case of total operating expense. For example, the average figure for payroll cost of grocery chains was 6.98 per cent of net sales. This figure was obtained by expressing the payroll cost of each chain as a percentage of its total sales, arranging these percentages in ascending order of magnitude, omitting the lower and upper quarters of the range and taking the average of the middle group. The boundary figures of the middle range in this case were 5.75 per cent and 8.13 per cent. That is to say, one-quarter of the chains had a payroll cost of less than 5.75 per cent of sales, one-quarter of the chains had a payroll cost of more than 8.13 per cent, and one-half the firms had a payroll cost ratio lying between these figures, and the average of these ratios was 6.98

Each item in Table XI was obtained by arranging the corresponding items for each chain in an array and following the procedure already outlined for total operating expense and payroll cost. In interpreting these middle range figures, then, each item must be considered independently as neigher all the high nor all the low figures came from the same reports. That is to say, the items in any column in this middle range table cannot be related to other items in the same column. For instance, the

upper limit of the middle range for average sales per store of grocery chains was $52,577. The upper limit of the middle range for total operating expense was 15.71 per cent of net sales. Obviously, however, these two values cannot be related since the grocery chains with high average sales per store have the smallest operating expense. Nor is it probable that any one chain would have all its items equal to the average figures given in this table, but it is thought that, considering each item independently, these middle range figures give a fair indication of chain operating results.

Table I(a)

FOOD CHAINS

Summary of Grocery, Combination, Meat and Fish Market Chains

	Grocery chains	Combination chains	Meat and fish market chains
Number of chains	44	23	21
Number of stores	749	1,379	225
Net sales, 1930	$45,043,653	$74,800,139	$ 8,447,682
Stocks on hand, end of year (at cost)	$ 2,775,545	$ 3,474,744	$ 218,262
Full-time employees —			
Male	1,508	4,211	712
Female	953	698	53
Salaries	$ 2,420,048	$ 5,902,500	$ 883,845
Part-time employees —			
Male	393	1,796	75
Female	311	279	5
Salaries	$ 95,041	$ 471,479	$ 28,409
Total payroll reported	$ 2,515,089	$ 6,373,979	$ 912,254
All other expenses, including rent	$ 2,651,432	$ 6,636,786	$ 856,295
Total operating expenses - per cent to net sales	11.47	17.39	20.94
Number of stores in leased premises	677	1,239	208
Rent paid for leased premises	$ 728,836	$ 1,803,162	$ 209,080
Net sales of stores in leased premises	$39,411,281	$67,848,683	$ 7,730,348
Per cent of rent to sales in leased premises	1.85	2.65	2.70
Number of chains reporting credit sales	12	11	11
Total net sales in chains reporting credit	$ 3,195,529	$30,791,236	$ 6,178,587
Net credit sales reported	$ 705,963	$ 1,212,749	$ 3,176,543
Ratio of credit sales to total sales	22.09	3.94	51.41
Number of chains reporting that they sell only for cash	26	6	8
Total net sales of such chains	$38,239,134	$41,391,194	$ 2,082,929

Table I(b)

Kinds of Stores Operated by Combination Chains

	All stores		Grocery stores		Combination stores		Meat markets	
	Stores	Sales	Stores	Sales	Stores	Sales	Stores	Sales
		$		$		$		$
All combination chains	1,379	74,800,139	665	23,478,835	698	51,011,609	16	309,695
Chains of less than 11 units	84	4,818,876	6	180,002	76	4,569,253	2	69,621
Chains of 11 units or over	1,295	69,981,263	659	23,298,833	622	46,442,356	14	240,074

Table II(a)

FOOD CHAINS

Grocery, Meat, and Combination Chains, Combined

Chain units classified by date of establishment and geographic location

Geographic Division	Total units	Per cent of total units	Date of establishment of units					Before 1926	Units whose ages cannot be classified
			1930	1929	1928	1927	1926		
Canada, all divisions	2,353	100.0	336	464	342	249	113	714	135
Northwest Territories and Yukon	2	-	-	-	-	-	-	2	-
British Columbia	244	10.4	40	41	33	18	8	92	12
Alberta	120	5.1	14	33	8	11	7	47	-
Saskatchewan	165	7.1	36	58	20	12	3	32	4
Manitoba	121	5.1	23	78	5	-	2	12	1
Ontario	1,107	47.1	117	154	164	106	67	439	60
Quebec	495	21.1	77	90	84	96	23	72	53
New Brunswick	30	1.3	11	3	6	-	-	8	2
Nova Scotia	67	2.8	17	7	21	6	3	10	3
Prince Edward Island	2	-	1	-	1	-	-	-	-

Table II(b)

Chain units classified by date of establishment and size of chain

	Total units		Units in chains of -				
	Number	Per cent of total	More than 100 units	51-100 units	11-50 units	6-10 units	4 and 5 units
Total, all units	2,353	.....	1,255	444	308	193	153
Less units which cannot be classified as to age	135	.....	63	4	41	6	21
Units classified as to age	2,218	100.0	1,192	440	267	187	132
All units established -							
1930	336	15.1	197	43	22	56	18
1929	464	20.9	258	111	52	22	21
1928	342	15.4	175	67	65	24	11
1927	249	11.2	150	41	33	10	15
1926	113	5.1	61	23	10	11	8
Before 1926	714	32.3	351	155	85	64	59

Table III

FOOD CHAINS

Stores and Sales, by Provinces and Size of Locality. Grocery, Combination and Meat Chains, Combined

	All Localities			Stores and sales in places with population of -					
				Over 100,000			30,000 - 100,000		
	Stores	Sales	Per cent of total chain sales	Stores	Sales	Per cent of total chain sales	Stores	Sales	Per cent of total chain sales
		$			$			$	
Canada, total	2,353	128,291,474	100.00	1,037	57,166,290	44.56	329	16,352,089	12.75
Northwest Territories & Yukon	2	(X)	100.00	-	-	-	-	-	-
British Columbia	244	10,116,969	100.00	142	5,437,801	53.74	13	523,946	5.18
Alberta	120	5,587,029	100.00	-	-	-	67	3,055,449	54.69
Saskatchewan	165	6,969,273	100.00	-	-	-	48	2,197,087	31.52
Manitoba	121	5,688,985	100.00	81	3,602,648	63.33	-	-	-
Ontario	1,107	71,133,271	100.00	502	32,945,013	46.32	516	6,720,486	9.44
Quebec	495	23,708,263	100.00	312	15,180,828	64.03	51	2,348,989	9.91
New Brunswick	30	1,267,244	100.00	-	-	-	10	618,836	48.83
Nova Scotia	67	3,534,518	100.00	-	-	-	24	887,296	25.11
Prince Edward Island	2	(X)	100.00	-	-	-	-	-	-

	10,000 - 30,000			1,000 - 10,000			Less than 1,000		
		$			$			$	
Canada, total	334	23,306,372	18.17	489	26,187,492	20.41	164	5,279,231	4.11
Northwest Territories & Yukon	-	-	-	-	-	-	2	(X)	100.00
British Columbia	11	540,376	5.34	45	2,451,609	24.23	33	1,163,237	11.51
Alberta	7	578,718	10.36	28	1,310,763	23.46	18	642,099	11.49
Saskatchewan	13	725,213	10.41	49	2,684,586	38.52	55	1,362,387	19.55
Manitoba	6	330,543	5.81	22	1,267,294	22.27	12	488,500	8.59
Ontario	214	16,657,842	23.43	240	13,467,077	18.93	35	1,342,853	1.88
Quebec	73	3,690,728	15.57	56	2,422,484	10.22	3	65,234	.27
New Brunswick	3	93,627	7.39	14	(X)	(X)	3	(X)	(X)
Nova Scotia	6	(X)	(X)	34	2,043,941	57.84	3	(X)	(X)
Prince Edward Island	1	(X)	(X)	1	(X)	(X)	-	-	-

An (X) indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table IV

FOOD CHAINS

Chains Analysed According to Cost of Rent

Grocery, Combination and Meat Chains

	Grocery Store Chains			Combination Store Chains			Meat Market Chains		
	Chains paying rent in excess of 3 per cent of net sales	Chains paying rent of 2 to 3 per cent of net sales	Chains paying rent of less than 2 per cent of net sales	Chains paying rent in excess of 3 per cent of net sales	Chains paying rent of 2 to 3 per cent of net sales	Chains paying rent of less than 2 per cent of net sales	Chains paying rent in excess of 3 per cent of net sales	Chains paying rent of 2 to 3 per cent of net sales	Chains paying rent of less than 2 per cent of net sales
Number of chains	6	15	23	1	12	10	4	11	6
Number of units.	36	315	398	(X)	1,333	46	37	158	30
Net sales, 1930.	$852,871	$12,668,713	$31,522,069	(X)	$72,500,848	$2,299,291	$1,009,051	$5,492,526	$1,946,105
Average sales per unit	$ 23,691	$ 40,218	$ 79,201	(X)	$ 54,389	$ 49,984	$ 27,272	$ 34,763	$ 64,870
Total operating expense	$149,615	$ 1,615,241	$ 3,401,665	(X)	$12,629,695	$ 381,070	$ 171,590	$1,275,330	$ 321,629
Per $100 of sales	17.54	12.75	10.80	(X)	17.30	16.60	17.00	23.20	16.50
Total payroll cost	$ 68,758	$ 881,875	$ 1,564,456	(X)	$ 6,154,014	$ 219,965	$ 102,038	$ 632,456	$ 177,760
Per $100 of sales	8.06	6.96	4.90	(X)	8.40	9.50	10.10	11.50	9.10
Other store operating expense, including rent.	$ 80,857	$ 733,366	$ 1,837,209	(X)	$ 6,475,681	$ 161,105	$ 69,552	$ 642,874	$ 143,869
Per $100 of sales	9.48	5.79	5.90	(X)	8.90	7.10	6.90	11.70	7.40
Rent in leased premises per $100 of sales in leased premises (included in above figures)	3.56	2.45	1.54	(X)	2.69	1.36	3.83	2.81	1.54
Number of units rented	36	281	360	(X)	1,230	40	36	153	19

(X) These figures cannot be given without disclosing individual operations, but they are included in the next column.

Table V

FOOD CHAINS

Grocery Chain Operating Expenses

A. Chains Classified by Type of Operation.

	Number of chains	Number of stores	Net sales (1930)	Per cent of units opened in 1930	Store operating expenses: Total expenses	Per $100 sales	Payroll	Per $100 sales	Other operating expenses including rent	Per $100 sales	Rent in leased premises per $100 sales in leased premises
			$		$		$		$		
Total, all chains.	44	749	45,043,653	13.2	5,166,521	11.47	2,515,089	5.58	2,651,432	5.89	1.85
Local chains	26	246	10,148,670	24.8	1,398,870	13.78	732,665	7.22	666,205	6.56	2.17
Provincial chains	14	462)	34,894,983	7.6	3,767,651	10.80	1,782,424	5.11	1,985,227	5.69	1.75
Sectional chains	4	41)									

B. Chains Classified by Number of Units Operated.

			$		$		$		$		
Total, all chains.	44	749	45,043,653	13.2	5,166,521	11.47	2,515,089	5.58	2,651,432	5.89	1.85
Chains having —											
51 - 100 units	5	375	27,720,056	10.9	2,897,258	10.45	1,396,765	5.04	1,500,493	5.41	1.80
11 - 50 units	11	210	10,732,976	7.6	1,347,476	12.55	627,906	5.85	719,570	6.70	1.84
6 - 10 units	16	110	4,082,645	31.8	579,085	14.18	306,959	7.52	272,126	6.66	1.90
4 - 5 units	12	54	2,507,976	13.0	342,702	13.66	183,459	7.32	159,243	6.34	2.29

Table V (Continued) -

FOOD CHAINS

Grocery Chain Operating Expenses

C. Chains Classified by Total Sales Volume.

	Number of chains	Number of stores	Net sales (1930)	Per cent of units opened in 1930	Store operating expenses: Total	Per $100 sales	Payroll	Per $100 sales	Other operating expenses, including rent	Per $100 sales	Rent in leased premises per $100 sales in leased premises
			$		$		$		$		
Total, All Chains	44	749	45,043,653	13.2	5,166,521	11.47	2,515,089	5.58	2,651,432	5.89	1.85
Chains whose total sales are --											
Over $1,000,000	10	494	35,821,387	9.5	3,925,395	10.96	1,848,455	5.16	2,076,940	5.80	1.78
$250,000 - $1,000,000	14	142	6,019,421	16.9	800,610	13.30	434,663	7.22	365,947	6.08	2.11
$100,000 - $250,000 .	17	99	2,964,130	27.3	405,946	13.70	218,981	7.39	186,965	6.31	1.95
Less than $100,000 ..	3	14	238,715	7.1	34,570	14.48	12,990	5.44	21,580	9.04	4.20

D. Chains Classified According to Average Sales per Store.

			$		$		$		$		
Total, All Chains	44	749	45,043,653	13.2	5,166,521	11.47	2,515,089	5.58	2,651,432	5.89	1.85
Average sales per store --											
Over $60,000	9	210	26,411,196	15.0	2,762,095	10.46	1,282,040	4.85	1,480,055	5.61	1.70
$30,000 - $60,000 ...	21	426	16,051,629	11.0	2,039,267	12.70	1,038,103	6.47	1,001,164	6.23	1.99
Less than $30,000 ...	14	113	2,580,828	18.0	365,159	14.15	194,946	7.55	170,213	6.60	2.36

Table VI

FOOD CHAINS

Sales by Commodities

Grocery Store Chains

Total Sales, All Chains		$45,043,653
Less amount which cannot be broken down into commodities		$11,902,800
Sales further analysed		$33,140,853
		Per cent
Commodity		100.00
Bakery products, fresh		1.51
Beverages, bottled		.55
Candy, confectionery and nuts		3.05
Delicatessen and ready-to-serve foods (not canned or bottled)		.50
Fish and other sea foods, fresh		.03
Fruits and vegetables, fresh		6.46
Groceries, general line, total		78.47
Butter and cheese	13.63	
Eggs	4.25	
Lard, lard substitutes and cooking fats and oils	2.54	
Flour	2.51	
Sugar	7.76	
Salmon, canned	2.14	
Other groceries (including canned and bottled goods other than canned salmon)	45.64	
Meats (including poultry)		2.92
Milk and cream, fluid		.06
Soda fountain sales and ice cream		.01
Non-food Commodities --		
Cigars, cigarettes and tobacco		.37
Household supplies -		
(a) Soap		3.10
(b) All other (including cleaning compounds, matches, etc.)		2.56
All other non-food products		.41

Table VII

FOOD CHAINS

Combination Chain Operating Expenses

A. Chains Classified by Type of Operation.

	Number of chains	Number of stores	Net sales (1930)	Per cent of units opened in 1930	Store operating expenses: Total	Per $100 sales	Payroll	Per $100 sales	Other operating expenses, including rent	Per $100 sales	Rent in leased premises per $100 sales in leased premises
			$		$		$		$		
Total, all chains	23	1,379	74,800,139	14.9	13,010,765	17.39	6,373,979	8.52	6,636,786	8.87	2.65
Local chains	12	66	4,004,210	15.2	693,655	17.32	395,344	9.87	298,311	7.45	1.86
Provincial chains	6	95	70,795,929	14.9	12,317,110	17.40	5,978,635	8.44	6,338,475	8.96	2.70
Sectional chains	3	509									
National chains	2	709									

B. Chains Classified by Number of Units Operated.

			$		$		$		$		
Total, all chains	23	1,379	74,800,139	14.9	13,010,765	17.39	6,373,979	8.52	6,636,786	8.87	2.65
Chains having more than 100 units	4	1,149	61,003,493	16.4	10,722,241	17.58	5,197,234	8.52	5,525,007	9.06	2.77
51 - 100 units	1	69	8,977,770	2.7	1,442,850	16.07	698,902	7.78	743,948	8.29	2.35
11 - 50 units	2	77									
7 - 10 units	4	31	2,765,190	25.6	452,525	16.37	261,239	9.45	191,286	6.92	2.21
6 units	2	12									
5 units	1	5	2,053,686	4.9	393,149	19.14	216,604	10.55	176,545	8.59	1.38
4 units	9	36									

C. Chains Classified by Total Sales Volume.

	Number of chains	Number of stores	Net sales (1930)	Per cent of units opened in 1930	Store operating expenses: Total	Per $100 sales	Payroll	Per $100 sales	Other operating expenses, including rent	Per $100 sales	Rent in leased premises per $100 sales in leased premises
			$		$		$		$		
Total, all chains	23	1,379	74,800,139	14.9	13,010,765	17.39	6,373,979	8.52	6,636,786	8.87	2.65
Chains whose total sales are —											
Over $1,000,000	8	1,305	71,237,586	14.8	12,399,534	17.40	6,027,399	8.46	6,372,135	8.94	2.72
$250,000 - $1,000,000	6	33	2,238,818	12.1	360,177	16.09	216,128	9.65	144,049	6.44	1.76
$100,000 - $250,000 .	7	33	1,323,735	21.9	251,054	18.97	130,452	9.85	120,602	9.12	1.75
Less than $100,000 .	2	8									

D. Chains Classified According to Average Sales per Store.

			$		$		$		$		
Total, all chains	23	1,379	74,800,139	14.9	13,010,765	17.39	6,373,979	8.52	6,636,786	8.87	2.65
Average sales per store —											
Over $65,000	6	358	27,278,988	25.1	4,687,720	17.18	2,405,888	8.82	2,281,832	8.36	2.52
$50,000 - $65,000 ..	8	334	18,133,156	14.7	3,398,815	18.74	1,700,481	9.38	1,698,334	9.36	2.77
Under $50,000	9	687	29,387,995	9.8	4,924,230	16.76	2,267,610	7.72	2,656,620	9.04	2.74

Table VIII

FOOD CHAINS

Sales by Commodities

Combination Store Chains (Grocery and Meat)

Total Sales, All Chains		$74,800,139
Less amount which cannot be broken down into commodities		17,749,800
Sales further analysed		57,050,339
		Per cent
Commodity		100.00
Bakery products, fresh		2.95
Beverages, bottled		.40
Candy, confectionery and nuts		1.25
Delicatessen and ready-to-serve foods (not canned or bottled)		1.61
Fish and other sea foods, fresh		1.91
Fruits and vegetables, fresh		11.11
Groceries, general line, total		53.87
Butter and cheese	9.50	
Eggs	2.96	
Lard, lard substitutes, and cooking fats and oils	1.44	
Flour	1.39	
Sugar	5.80	
Salmon, canned	1.10	
Other groceries (including canned and bottled goods other than canned salmon)	31.68	
Meats (including poultry)		22.57
Milk and cream, fluid		.30
Non-food Commodities —		
Cigars, cigarettes, tobacco and smokers' supplies		.48
Household supplies —		
(a) Soap		2.52
(b) All other (including cleaning compounds, matches, etc)		1.03

TABLE IX

FOOD CHAINS

Meat Market Chain Operating Expenses

A. Chains Classified by Type of Operation.

	Number of chains	Number of stores	Net sales (1930)	Per cent of units opened in 1930	Store operating expenses: Total	Per $100 sales	Payroll	Per $100 sales	Other operating expenses, including rent	Per $100 sales	Rent in leased premises per $100 sales in leased premises
			$		$		$		$		
Total, All Chains ..	21	225	8,447,682	13.8	1,768,549	20.94	912,254	10.80	856,295	10.14	2.70
Local chains	16	100	3,852,917	16.0	659,289	17.11	378,616	9.83	280,673	7.28	2.72
Provincial chains	3	15)	4,594,765	12.0	1,109,260	24.14	533,638	11.61	575,622	12.53	2.69
Sectional chains	2	110)									

B. Chains Classified by Number of Units Operated.

			$		$		$		$		
Total, All Chains ..	21	225	8,447,682	13.8	1,768,549	20.94	912,254	10.80	856,295	10.14	2.70
Chains having —											
More than 100 units	1	106)									
51 - 100 units	-	-)	5,516,538	8.4	1,252,701	22.71	632,156	11.46	620,545	11.25	2.83
11 - 50 units	1	21)									
7 - 10 units	2	16)									
6 units	4	24)									
5 units	6	30)	2,931,144	23.8	515,848	17.60	280,098	9.56	235,750	8.04	2.41
4 units	7	28)									

Table IX (Continued) --

FOOD CHAINS

Meat Chain Operating Expenses

C. Chains Classified by Total Sales Volume.

	Number of chains	Number of stores	Net sales (1930)	Per cent of units opened in 1930	Store operating expenses: Total	Per $100 sales	Payroll	Per $100 sales	Other operating expenses, including rent	Per $100 sales	Rent in leased premises per $100 sales in leased premises
			$		$		$		$		
Total, All Chains ..	21	225	8,447,682	13.8	1,768,549	20.94	912,254	10.80	856,295	10.14	2.70
Chains whose total sales are —											
Over $500,000	3	134	5,113,194	9.0	1,180,617	23.09	588,482	11.51	592,135	11.58	2.85
$250,000 - $500,000	6	35	1,979,839	28.6	320,856	16.21	164,836	8.33	156,020	7.88	2.24
$100,000 - $250,000	8	36	1,137,599	22.2	214,229	18.83	126,882	11.15	87,347	7.68	2.44
Less than $100,000	4	20	217,050	5.0	52,847	24.35	32,054	14.77	20,793	9.58	3.67

D. Chains Classified According to Average Sales per Store.

			$		$		$		$		
Total, All Chains ..	21	225	8,447,682	13.8	1,768,549	20.94	912,254	10.80	856,295	10.14	2.70
Average sales per store —											
Over $45,000	8	41	2,709,621	24.4	444,735	16.41	243,653	8.99	201,082	7.42	1.93
$25,000 - $45,000	6	148	5,173,230	10.1	1,197,450	23.15	594,484	11.49	602,966	11.66	2.99
Under $25,000	7	36	564,831	16.7	126,364	22.37	74,117	13.12	52,247	9.25	3.29

Table X

FOOD CHAINS

Sales by Commodities

Meat and Fish Market Chains

Total Sales, All Chains		$8,447,682
Less amount which cannot be broken down into commodities		1,740,900
Sales further analysed		6,706,782
		Per cent
Commodity		100.00
Bakery products, fresh		.12
Beverages, bottled		.01
Candy, confectionery and nuts		.04
Delicatessen and ready-to-serve foods (not canned or bottled).		.10
Fish and other sea foods, fresh		1.81
Fruits and vegetables, fresh		.34
Groceries, general line, total		12.48
Butter and cheese	7.97	
Eggs	3.40	
Lard, lard substitutes, and cooking fats and oils.	.43	
Flour	.09	
Sugar	.05	
Salmon, canned	.07	
Other groceries (including canned and bottled goods other than canned salmon)	.47	
Meats (including poultry)		84.88
Milk and cream, fluid		.09
Non-food Commodities:		
Household supplies —		
(a) Soap		.04
(b) All other (including cleaning compounds, matches, etc.)		.09

Table XI

FOOD CHAINS

Middle Range Figures - Grocery Chains

	Lower Limit of Middle Range	Average of Middle Range	Upper Limit of Middle Range
Total sales volume of chain	$176,962	$324,519	$695,450
Average sales per store	$ 26,430	$ 37,842	$ 52,577
Per cent of total number of stores opened in 1930	0.00	6.97	16.67
Payroll cost per $100 sales	5.75	6.98	8.13
Rental cost per $100 sales in leased premises	1.56	1.99	2.42
Other operating expense - not including salaries or rent	3.00	4.65	6.13
Total operating expense per $100 sales	11.59	13.62	15.71
Average yearly salary per full-time employee.	$ 765	$ 914	$ 1,142
Number of employees per $100,000 sales	6.08	7.45	9.61

Middle Range Figures - Combination Chains

Total sales volume of chain	$206,530	$503,899	$1,386,275
Average sales per store	$ 38,507	$ 54,081	$ 64,774
Per cent of total number of stores opened in 1930	0.00	5.35	25.00
Payroll cost per $100 sales	8.15	9.28	10.45
Rental cost per $100 sales in leased premises	1.42	2.07	2.52
Other operating expense - not including salaries or rent	4.82	6.07	7.31
Total operating expense per $100 sales	14.54	16.70	17.86
Average yearly salary per full-time employee.	$ 944	$ 1,132	$ 1,309
Number of employees per $100,000 sales	6.38	8.18	9.51

Middle Range Figures - Meat Market Chains

Total sales volume of chain	$105,212	$197,462	$342,859
Average sales per store	$ 22,119	$ 38,600	$ 54,946
Per cent of total number of stores opened in 1930	0.00	5.75	20.00
Payroll cost per $100 sales	8.92	10.86	12.17
Rental cost per $100 sales in leased premises	1.74	2.48	2.88
Other operating expense - not including salaries or rent	4.72	5.77	7.36
Total operating expense per $100 sales	15.34	19.36	21.48
Average yearly salary per full-time employee.	$ 957	$ 1,148	$ 1,403
Number of employees per $100,000 sales	6.94	8.98	11.68

Since each item in this table was obtained independently, the figures in any one column cannot be related to each other. Nor can the individual expense items be added to obtain the total expense ratios shown. For explanations on the method of obtaining these figures, see introduction.

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS, 1933.

Food Chains in Canada, 1930 - 1933

This report is the first of a series presenting preliminary figures for the Census of Merchandising and Service Establishments, 1933. The basic figures for the year 1930 were secured from the Census taken in 1931, and the data for the period 1931 to 1933 have been furnished for the Census just concluded.

These preliminary figures of the retail sales of food chains relate only to chain store organizations and cannot be taken as a true indication of the trend of business for all food stores until the figures for independent stores have been prepared and compared with chain store sales. It is also necessary to point out that the entrance of new chain store organizations into this field, either through the expansion of single or multiple stores into chains or the formation of new companies and the disappearance of chain store organizations through ceasing to do business or retaining less than four units, affect the volume of trade handled by chains from year to year.

The food chains covered in this report are grocery chains, combination store chains (those selling both groceries and meats), and meat market and fish market chains. Separate details are given for each of the three classifications mentioned. Due to the development of units of the straight grocery type into combination stores selling both groceries and meats, it has been necessary to make a number of changes in classification of the various chains, and a better comparison of the trends in business of these food chains is therefore obtained from a consideration of the combined figures for the three classifications.

A group of stores has been considered as a chain only when four or more stores are under the same ownership or management and carry on the same or similar kinds of business. In 1930, there were 88 of these food chains operating in Canada. The maximum number of stores in operation during that year was 2,353, and these stores did a total business of $128,291,800. In 1933, there were 87 food chains operating a maximum of 2,348 stores and having sales amounting to $102,940,200. Representing the sales of food chains in 1930 by 100, the relative sales for the three succeeding years may be represented by 97.16, 85.50 and 80.24 respectively.

In Table II these food chains have been classified geographically, giving figures by provinces for each of the years 1930 and 1933. In order to avoid disclosing the operations of individual companies, it has been necessary to give combined figures for the Maritime Provinces, while data for the Yukon and Northwest Territories are not shown but are included in the grand totals. The Maritime Provinces showed an increase in chain store business of 2.14 per cent over the amount reported in 1930, but this increase is due to the increase in the number of chain units from 99 in 1930 to 141 in 1933. Decreases in chain store business were reported in the other geographic divisions. The greatest reduction is noted in Saskatchewan, where food chain sales in 1933 were 59.94 per cent of the 1930 figure, while British Columbia showed the smallest decrease, the 1933 figure amounting to 92.59 per cent of the 1930 business.

Grocery Chains.--In 1930, there were 44 grocery chains in Canada. These operated 749 stores and had total retail sales of $45,043,800. In 1933, there were 42 chains of this type which operated 805 stores and had total sales of $36,519,600.

Combination Store Chains.--These organizations differ from grocery chains in that they operate at least a substantial proportion of units having meat departments. Later reports will be issued showing the number of straight grocery and combination stores operated by these chains, but at present total figures only are given. In 1930, there were 23 combination store chains in Canada which operated 1,379 stores and had total sales of $74,800,200. In 1933, the number of chains had increased to 27, while the number of units had decreased to 1,357, and total retail sales amounted to $60,758,100.

Meat Market Chains.--During 1930, there were 21 meat market chains operating and these had 225 stores with total retail sales of $8,447,800. An analysis of the sales of these stores, obtained in connection with the 1931 Census, showed that, of their total business, the sale of meats and poultry amounted to almost 85 per cent, while sales of butter, cheese and eggs made up the greater part of the remainder. In 1933, there were 18 meat market chains having 188 stores and doing a total retail business of $5,662,500 or 67.03 per cent of the 1930 turnover.

Voluntary Chains

For the purposes of this Census, groups of independent retailers formed into organizations for buying and/or advertising purposes have been classified as voluntary chains. While a number of these chains have been formed by dealers in drugs, hardware and shoes, they have developed chiefly for the purchasing of groceries and allied products. Only chains of this latter type are included in this report.

Two types of voluntary chains have developed in Canada during recent years. The first, known as the "wholesaler retailer" type, consists of a group of stores more or less closely connected with a single wholesaler or group of wholesalers who service the individual members. The store fronts are uniform in design and all the individual units are known by the name of the group to which they belong. Chains of this type are here designated "Type A".

The second type, known as "retailer wholesaler", consists of independent retailers who have formed group buying organizations in order to secure some of the benefits of bulk purchasing. In some cases, orders are placed through a secretary appointed by the organization, while in other instances one of the members becomes responsible for the purchase of a consignment of goods. These goods are then distributed among the members of the group. This type is referred to in this bulletin as "Type B".

The wholesalers servicing these voluntary chains deal largely in foodstuffs, but the retail stores may sell a wide range of commodities and their co-operative buying activities may function only for particular lines such as groceries. Trends in the total sales of these chains would not, therefore, be a true indication of the growth of the voluntary chain system in Canada. A better idea of the development of these chains would be obtained from a comparison of the yearly purchases made upon a co-operative basis by the different members.

In connection with the latest Census of Merchandising, schedules were sent to each of the wholesalers servicing voluntary chains, requesting that they indicate the maximum number of members in their group during each of the years 1930 to 1933. Data regarding the value of sales made to members were also asked. For those groups which had no particular wholesaler (Type B), schedules were sent to the secretaries or to one of the members, requesting the number of members and data regarding the value of purchases made during the same years.

In 1930, there were altogether 23 voluntary chains with a maximum number of 4,545 members, and purchases made by these members (at wholesale prices) amounted to $23,006,881. By 1933, the number of organizations had increased to 27, the number of members to 6,170, and purchases at wholesale prices amounted to $26,740,183. Or, representing by 100 the purchases made by these voluntary chains in 1930, the value of purchases made during the three succeeding years may be represented by 104.7, 111.5 and 116.2 respectively.

Of the 27 voluntary chains operating in 1933, 18 were of Type A and 9 were of Type B. Those of Type A had a maximum of 5,625 members in 1933, and purchases by these members, or sales by the wholesalers, amounted to $24,569,878. The 9 chains of Type B had 545 members and purchases made by these members amounted to $2,170,310.

Figures regarding number of chains, stores and purchases for all voluntary chains are given for each of the years 1930 to 1933 inclusive in Table VII. In Tables VIII and IX, these figures are divided, giving separate details for each of the two types.

Food Chains in Canada, 1930 - 1933

Grocery, Combination and Meat Store Chains Combined

Table I.--Number of Chains, Stores and Total Sales, by Years, 1930 - 1933.

	1930	1931	1932	1933
Number of chains ...	88	87	85	87
Number of stores (maximum)	2,353	2,418	2,395	2,348
Total Sales	$128,291,800	$124,642,400	$109,693,300	$102,940,200
Index of chain sales (1930=100)	100.00	97.16	85.50	80.24

Table II.--Number of Food Chains, Stores and Sales by Provinces, 1930 and 1933 Compared.

		1930	1933
CANADA, TOTAL -	Chains	88	87
	Stores	2,353	2,348
	Sales.	$128,291,800	$102,940,200
Index of chain sales (1930=100)		100.00	80.24
British Columbia -	Chains	19	17
	Stores	244	281
	Sales.	$ 10,117,100	$ 9,367,200
Index of chain sales (1930=100)		100.00	92.59
Alberta -	Chains	8	11
	Stores	120	126
	Sales.	$ 5,587,000	$ 4,519,100
Index of chain sales (1930=100)		100.00	80.89
Saskatchewan -	Chains	10	8
	Stores	165	140
	Sales.	$ 6,969,300	$ 4,177,600
Index of chain sales (1930=100)		100.00	59.94
Manitoba -	Chains	8	6
	Stores	121	110
	Sales.	$ 5,689,100	$ 4,697,600
Index of chain sales (1930=100)		100.00	82.57
Ontario -	Chains	37	36
	Stores	1,107	1,087
	Sales.	$ 71,133,200	$ 54,989,500
Index of chain sales (1930=100)		100.00	77.30
Quebec -	Chains	13	10
	Stores	495	463
	Sales.	$ 23,708,400	$ 20,071,900
Index of chain sales (1930=100)		100.00	84.66
Maritime Provinces -	Chains	13	15
	Stores	99	141
	Sales.	$ 5,009,900	$ 5,117,300
Index of chain sales (1930=100)		100.00	102.14

Table III.--Number of Chains, Stores, Employment and Wage Facts, Sales and Stocks, 1933.

Number of chains		87
Number of stores		2,348
Employees and wages (including part-time) -		
(Store managers and employees only included)	Male	9,474
	Female	1,840
	Wages	$ 7,897,900
Total Sales, 1933		$102,940,200
Stocks on hand in stores, end of year, at cost		$ 6,138,000

Grocery Chains in Canada

Table IV.--Chains, Stores and Total Sales, by Years, 1930 - 1933.

	1930	1931	1932	1933
Number of chains	44	41	40	42
Number of stores	749	758	780	805
Total Sales	$45,043,800	$40,051,300	$36,678,400	$36,519,600
Index of chain sales (1930=100)	100.00	88.92	81.43	81.08

Combination Store Chains in Canada

Table V.--Chains, Stores and Total Sales, by Years, 1930 - 1933.

	1930	1931	1932	1933
Number of chains	23	26	26	27
Number of stores	1,379	1,447	1,416	1,357
Total Sales	$74,800,200	$76,988,600	$67,006,300	$60,758,100
Index of chain sales (1930=100)	100.00	102.93	89.58	81.13

Meat Market Chains in Canada

Table VI.--Chains, Stores and Total Sales, by Years, 1930 - 1933.

	1930	1931	1932	1933
Number of chains	21	20	19	18
Number of stores	225	213	199	186
Total Sales	$ 8,447,800	$ 7,602,500	$ 6,008,600	$ 5,662,500
Index of chain sales (1930=100)	100.00	89.99	71.13	67.03

Voluntary Chains in Canada, 1930 - 1933

Table VII.--All Voluntary Chains - Chains, Stores and Purchases by Members from Wholesalers, by Years.

Year	Number of chains	Number of stores	Total Purchases (at wholesale prices)	Index of purchases
			$	
1930	23	4,545	23,006,881	100.00
1931	26	5,345	24,076,795	104.65
1932	26	5,899	25,657,597	111.52
1933	27	6,170	26,740,188	116.23

able VIII.--Type A - Voluntary Chains.

Year	Number of chains	Number of stores	Total Purchases (at wholesale prices)	Index of purchases
			$	
1930	15	4,198	21,661,272	100.00
1931	17	4,890	22,154,414	102.28
1932	17	5,399	23,575,490	108.84
1933	18	5,625	24,569,878	113.43

ıble IX.--Type B - Voluntary Chains.

Year	Number of chains	Number of stores	Total Purchases (at wholesale prices)	Index of purchases
			$	
1930	8	347	1,345,609	100.00
1931	9	455	1,922,381	142.87
1932	9	500	2,082,107	154.73
1933	9	545	2,170,310	161.29

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS

IN

CANADA

1934

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS.

FOOD CHAINS IN CANADA, 1934

Introduction

This report, based upon returns received for the annual Census of Merchandising and Service Establishments, presents a summary of the business transacted by food chains in Canada during 1934, together with comparative figures for earlier years. The food chains included here are grocery chains, combination store chains (those selling both groceries and meats), and meat market chains.

There were 86 food chain companies in Canada in 1934 operating 2,395 stores with sales of $104,912,800. In 1933 there were 91 food chain companies with 2,398 stores and $103,638,500 sales while in 1930, the earliest year for which data are available, there were 87 food chains with 2,352 stores and $127,582,500 sales. Thus, while the value of chain sales for 1934 was still 17.8 per cent below the 1930 level, it was 1.2 per cent higher than the amount reported for 1933.

A comparison of chain store sales with total retail sales shows that the 86 food chain companies operating in 1934 transacted 28.9 per cent of the business of all similar stores, including both chains and independents, for that year. Ratios of chain store sales to total sales for earlier years are 29.8 per cent for 1933, 29.7 per cent for 1932, 29.0 per cent for 1931, and 26.1 per cent for 1930. As there are comparatively few strictly meat market chains in Canada these ratios of chain store sales to total sales are considerably lower than they would be if figures for all meat markets, including chains and independents, were excluded from the calculations. When grocery and combination stores only are considered, the ratio of chain store sales to total sales was 32.8 per cent for 1934 as compared with 33.3 per cent for 1933 and 29.5 per cent for 1930. It should be understood, of course, that all comparisons between chain store sales and total sales refer to the total business of the stores in question and not to the sales of specified commodities. Many stores, in addition to the three kinds of food stores analyzed in this report, sell food products. Thus, while it is shown that food chains transacted 28.9 per cent of the total business of all similar stores in 1934, no information is available to show what proportion of the total sale of food products through all retail channels of distribution is made by chains. A comparison of food chain sales and total food store sales is given in the following table which shows the ratio of chain sales to the total trade for grocery, combination store and meat markets combined, and then for grocery and combination stores only.

Comparison of Food Chain Store Sales with Total Food Store Sales, by Years

Year	Grocery Stores, Combination Stores and Meat Markets			Grocery Stores and Combination Stores		
	All Stores, Total Sales	Chain Store Sales	Chain Ratio	All Stores, Total Sales	Chain Store Sales	Chain Ratio
	$	$		$	$	
1930	488,429,600	127,582,500	26.1	405,403,400	119,498,600	29.5
1933	347,397,000	103,638,500	29.8	297,307,000	98,862,100	33.3
1934	363,056,000	104,912,800	28.9	307,478,000	100,874,900	32.8

For the Census of Merchandising and Service Establishments a chain store system is taken to mean a group of four or more stores under the same ownership and management and carrying on the same or similar kinds of business. Voluntary chains, in which the different stores are individually owned and operated, but are grouped for buying and advertising purposes, are not included with the company chains but reference to these chains is made in a later section of this report and their activities are summarized in Table 2.

The 86 food chains operating in 1934 included 40 grocery chains with 746 stores and $37,390,600 sales. There were also 34 combination store chains operating 1,493 stores with $63,484,300 sales. A great many units belonging to these combination store chains sold groceries only but no information is available to show the number or value of sales of combination store units as distinguished from those of the purely grocery type. In addition to the grocery store chains and combination store chains there were also 12 meat market chains with 156 stores and these had sales of $4,037,900.

Employment and Wages in Food Chains.--The 86 food chains operating in 1934 required the services of 10,542 male and 1,872 female employees to whom $7,958,200 were paid in salaries and wages. These figures relate to all store employees, part-time as well as full-time, but they do not include head office or warehouse employees or payroll. A comparison of the sales figures, employment and wage data for the two years 1933 and 1934, shows that while the value of food chain sales increased in 1934 by slightly more than one per cent over the amount recorded for 1933, the average number of full-time and part-time store employees increased by 8.5 per cent while the amount paid in salaries and wages decreased slightly by .2 per cent below the 1933 figure.

Trends in Food Chain Sales by Provinces.--While for the Dominion as a whole food chain sales were 1.23 per cent higher in 1934 than in the preceding year, considerable variations from this average occurred in the several provinces. Five of the eight provinces for which figures can be shown reported an increase in food chain sales in 1934 over 1933 while a decrease in the value of sales was reported by three. The different provinces, together with the corresponding percentage changes in chain sales between the two years, are as follow: Alberta, +5.71 per cent; Manitoba, +4.21 per cent; British Columbia, +3.42 per cent; Nova Scotia, +2.86 per cent; Ontario, +2.01 per cent; Saskatchewan, -.22 per cent; Quebec, -3.41 per cent, and New Brunswick, -5.19 per cent.

It should be remembered that variations in the value of chain sales as recorded from year to year reflect the net composite effect of changes in the number of chain companies, variations in the number of stores operated by continuing firms and also variations in the value of sales of individual units. It should also be

remembered that variations in the number of chains shown from year to year are due not only to the total disappearance of old companies and to the introduction of new firms but also to changes in size of existing firms. Some firms which previously operated two or three stores have increased the number of their units to four or more and are now included with the chains. Other firms decreased the number of units operated below the four-store limit and are no longer classified as chains.

Comparison of Chain Store Sales and Total Sales by Provinces.--The ratio of chain store sales to total sales in the grocery, combination and meat market field was not uniform in 1934 for all provinces. In comparison with the Dominion average of 28.9 per cent, the ratio of chain store sales to total food store sales was greatest in Ontario and, with the exception of Prince Edward Island where only one chain unit was operating, it was lowest in New Brunswick. The several provinces, arranged in descending order of chain ratios for 1934, together with these percentages of chain store sales to total sales for that year are as follow: Ontario, 36.5 per cent; British Columbia, 35.6 per cent; Saskatchewan, 31.2 per cent; Manitoba, 30.6 per cent; Alberta, 27.9 per cent; Nova Scotia, 22.8 per cent; Quebec, 18.5 per cent, and New Brunswick, 14.4 per cent. A comparison of chain store ratios by provinces for 1933 and 1934 shows that, excepting only Manitoba where a slight increase took place, chains in the food store field transacted a smaller proportion of the total food store business in all provinces during 1934 than in the preceding year. Table 3 presents a summary of food chain business in Canada by provinces for each year from 1930 to 1934 and shows, for each province and year, the number of chain companies, number of chain units, value of chain sales, total food store sales and ratios of chain store sales to total sales. Indexes of chain sales on the base (1930 = 100) are also shown.

Distribution of Chain Stores and Sales by Provinces and by Size of Locality, 1934.--Of the 2,395 units of food chains operating in Canada during 1934, 1,086 were located in Ontario and 483 were in Quebec. There were 305 units in British Columbia, 370 in the Prairie Provinces and 149 in the Maritimes. Of the $104,912,800 sales made by these chains, the Ontario stores accounted for $56,563,500 or 53.91 per cent and the Quebec stores for 18.83 per cent. The proportions of the total chain store business attributable to the other provinces are as follow: British Columbia, 8.74 per cent; Manitoba, 4.67 per cent; Alberta, 4.55 per cent; Saskatchewan, 3.97 per cent; Nova Scotia, 3.77 per cent; and New Brunswick, 1.37 per cent.

In addition to giving the distribution by provinces, Table 4 presents a more detailed analysis of stores and sales by size of locality and shows that 47.15 per cent of the total value of sales for food chains in 1934 may be attributed to cities of 100,000 population or more. The proportions of the total business transacted in the other size-of-locality classes shown in the table are as follow: All places of 30,000 to 100,000 population combined, 13.16 per cent; all places of 10,000 to 30,000 population combined, 15.91 per cent; all places of 1,000 to 10,000 population combined, 18.20 per cent, and all unincorporated localities and places of less than 1,000 population, 5.58 per cent. In 1930 a slightly smaller proportion, or 44.64 per cent of the total food chain business, was transacted in the largest size-of-population class while 5.11 per cent was transacted in the smallest size class.

A comparison of the distribution of food chain stores by size of locality for 1934 as shown in Table 4 with a similar analysis (1) for 1930 reveals, in the main, only minor changes. For the Dominion as a whole there were slight increases in the number of stores in all size-of-locality classes excepting only the middle size group consisting of those places of from 10,000 to 30,000 population. Figures for British Columbia show 46 more stores in Vancouver in 1934 than in the earlier year. No significant changes in the distribution of stores occurred in Alberta or in Manitob

(1) Food Chains in Canada, 1930. Page 11 (Revised Figures).

In Saskatchewan decreases occurred in all size-of-locality classes; Ontario reported decreases in the three largest size-of-locality groups and minor increases in the two smaller ones. In Q uebec slight increases occurred in both the largest and the smallest size groups, while fewer stores were operating in the three middle classes in 1934 than in the earlier period. In the Maritime Provinces increases were reported for all localities reflecting the expansion of chain stores in that economic division in recent years.

Comparison of Chain Stores and Sales for Principal Cities, by Years, 1930 and 1934.--In Table 5 comparative figures for 1930 and 1934 are summarized to show the number of food chain stores and value of sales, firstly, for each province or economic division as a whole, secondly, for all cities of 30,000 population or more combined within each province or division, thirdly, for each individual city of 30,000 population or more, and, fourthly, for all places of lesser size combined. The percentage changes in value of sales between 1930 and 1934 are also given and show that for the Dominion as a whole and for all provinces, except Ontario and the Maritimes, the declines in food chain sales were greater in places of less than 30,000 population than in the larger cities and towns. For Ontario the decline in value of chain sales was 21.18 per cent for all places of 30,000 population or over combined as compared with 18.67 per cent for the group of smaller localities. In New Brunswick and Nova Scotia an increase of 43.3 per cent in value of chain sales was recorded for the larger population class while a smaller increase of 6.21 per cent was reported for the group of smaller places.

Wide differences are found in the percentage changes in value of chain store sales over the period 1930 to 1934 as shown for the 20 cities mentioned in Table 5, the total variation ranging from an increase of 66.58 per cent in the case of Halifax to a decrease of 55.75 per cent in the case of Saskatoon. Chain store sales were higher in 6 of the 20 cities in 1934 than in 1930 and were lower in 14. A decrease of less than 25 per cent was reported by 8 of the 14 cities registering declines in chain store sales, while decreases in the other 6 cities were in excess of that amount. These changes in the value of sales refer only to the business transacted by chain stores and cannot be taken as indicative of the business trends of all food stores. Table 5 also shows the maximum number of stores in each city and locality in 1930 and 1934. Since a considerable number of these stores were open for only part of the year, too much significance cannot be placed upon changes in average sales per store for different places as derived from the number of stores and value of sales shown in the table.

Gross Margins for Food Chains.--Gross margin for grocery chains in 1934 formed 17.57 per cent of total net sales for the same period. The gross margin ratio for combination store chains was 19.38 per cent of net sales while for meat markets it was 23.90 per cent.

The term "gross margin" is used here to represent the amount remaining after deducting the net cost of goods sold from net sales. The net cost of goods sold is calculated from the net cost of goods purchased during the year and from the inventory values at the beginning and close of the period. The net cost of goods purchased includes the invoice value less all returns, allowances and discounts, plus inward freight, cartage to warehouse, duty, insurance in transit, and other expenses incidental to receipt of merchandise. Warehousing charges and costs of transportation from warehouses to stores are not included in the purchase price and all operating expenses of the stores are, of course, excluded. Transportation costs of goods shipped directly from wholesalers or manufacturers or factory to the retail stores were to be included in the value of purchases.

Most of the larger chain store companies, in addition to performing the duties of retailers, carry on the work of wholesalers in so far as the physical handling of merchandise is concerned. To what extent the various chains perform the functions of wholesalers in addition to those of retailers it is difficult to say. An attempt was made to classify the different chain store companies according to the proportions of goods which they bought direct from manufacturers, but due to inadequate records in some cases and to the difficulty met by other firms in always distinguishing as between wholesalers and manufacturers this classification was not completed. It should be noted that the difference between the cost of goods sold and the value of net sales as reported by any chain company for the Census of Merchandising Establishments represents the gross margin for the entire organization rather than that margin or profit which might be considered applicable to the retailing function only. It should be stated, however, that several of the larger chain store companies which do not operate central warehouses in connection with their business are closely allied with a wholesale firm from which the stores are stocked. Gross margin figures reported by such chains relate to the retailing functions only and do not include the margin or profit applicable to the servicing wholesale companies.

Grocery Chains.--Gross margin for grocery store chains, as determined from the aggregate figures of the reporting firms, amounted to 17.57 per cent of net sale: When classified according to type of operation, it is found that gross margin for local chains (all units located within one town or city) formed 15.12 per cent of net sales as compared with 18.77 per cent for provincial and sectional chains. When the chains are classified according to the number of stores operated, those firms with less than 6 units were found to have a gross margin of 14.98 per cent of net sales. Gross margin was 16.42 per cent for chains with from 6 to 10 stores, 18.14 per cent for chains with from 11 to 50 stores, and 17.80 per cent for chains operating more than 50 stores. When classified according to total sales volume, chains having annual sales of less than $200,000 operated on a gross margin of 14.66 per cent of net sales as compared with 15.84 per cent for chains with annual sales of from $200,000 to $1,000,000 and 18.21 per cent for the larger chains with annual sales exceeding that amount. Generally speaking then, gross margin as a percentage of net sales increases as the size of chain increases. This result is, of course, consistent with the tending of the larger chains to assume the functions of wholesalers to a greater degree than the smaller organizations.

Combination Store Chains.--Gross margin for all combination store chains as a whole formed 19.38 per cent of net sales. Gross margins for combination store chains are shown in Table 7, in which the various chain companies are classified in a manner similar to that outlined for the grocery firms. In interpreting the figure given for these combination store chains, however, a number of factors should be kep in mind. In the first place, gross margin percentage of net sales is normally highe for meat markets than for grocery stores. The combination store chains analyzed her operated varying proportions of straight grocery stores and combination stores. In addition, all combination units did not sell similar proportions of grocery and meat products. Gross margin data for combination store chains are affected by these factors to such an extent that when the various companies are classified according to size no definite relationship can be observed as between size of chain and gross margin percentage of net sales.

In comparison with the average gross margin of 19.23 per cent of net sales for all combination store chains the ratio was 20.29 per cent for local chains, 20.1 per cent for provincial chains, and 19.23 per cent for sectional and national chains When classified according to size the larger chains were found to operate upon a slightly lower gross margin percentage of net sales than that reported by the smalle

Meat Market Chains.--Gross margin for the 12 meat market chains operating in 1934 averaged 23.90 per cent of net sales. In comparison with this figure the gross margin for local chains was 23.36 per cent while for provincial and sectional chains it was 24.27 per cent. When classified according to size of business, the gross margin for 6 chains each having annual sales of less than $200,000 averaged 24.78 per cent of sales as compared with 23.73 per cent for the remaining 6 companies, each of which had annual sales for 1934 exceeding $200,000.

Non-Weighted Average Gross Margins.--The average gross margin percentages mentioned in the preceding sections and shown in Tables 6, 7 and 8 were derived from the aggregate net sales and aggregate cost of goods sold as reported by the various firms. These averages are therefore influenced by the inclusion of data for the larger organizations and they may not be typical of average operating results. In order to obtain an average that would not be thus weighted the percentage of gross margin to net sales was computed for each company. These percentages were arranged in an array in ascending order and after omitting the lower and upper quarters of the figures the average of the middle half of the array was found. Using this method, average gross margin for grocery chains was found to be 16.1 per cent of net sales as compared with 17.57 per cent as obtained by the weighted method. The unweighted gross margin for combination store chains was 20.00 per cent as compared with 19.38 per cent and for meat market chains the unweighted average was 23.80 per cent as compared with 23.90 per cent.

Voluntary Chains.--The chains analyzed in the preceding sections are company operated organizations under the control of a central management. Reports were secured for the Census of Merchandising to show that there were also 23 voluntary food chains with 5,659 members in Canada during 1934. While the total value of sales for the members of voluntary chains is not known, information was received to show that the value of purchases made upon a co-operative basis from the affiliated wholesalers at wholesale prices was $26,842,228. In 1933 there were 27 voluntary food chains with 6,025 members and purchases upon a co-operative basis at wholesale prices for that year were valued at $26,725,418. Thus while there were fewer voluntary chains and 366 fewer members, the value of purchases made upon a co-operative basis increased by $116,810 indicating a corresponding increase in average purchases per store. A summary showing the number of voluntary food chains, number of members and value of purchases by years, from 1930 to 1934, is presented in Table 2.

Table 1.--Summary of Food Chain Stores in Canada, 1934

	Total, Food Chains	Grocery Chains	Combination Store Chains	Meat Market Chains
Number of chains	86	40	34	12
Number of stores, average(1)	2,310	719	1,440	151
Number of stores, maximum	2,395	746	1,493	156
Net sales, 1934	$104,912,800	$37,390,600	$63,484,300	$4,037,900
Stocks on hand, end of year, at cost --				
In retail stores	$ 5,894,500	$ 2,249,400	$ 3,568,900	$ 76,200
In warehouses	$ 3,185,700	$ 1,957,600	$ 1,216,600	$ 11,500
Gross margin, amount	$ 19,840,400	$ 6,570,800	$12,304,700	$ 964,900
Per cent of net sales	18.91	17.57	19.38	23.90
Average number of store employees (includes full-time and part-time) --				
Male	10,542	2,464	7,537	541
Female	1,872	1,076	772	24
Salaries and wages	$ 7,958,200	$ 2,206,100	$ 5,310,800	$ 441,300

(1) Derived from number of units at beginning, middle and end of the year.

Table 2.--Voluntary Food Chains in Canada, 1930 - 1934

(Number of Chains, Stores, Value of Purchases and Average Purchases Per Store)

Year	Number of Chains	Number of Stores	Total Purchases by Members (at Wholesale Prices)	Average Purchases Per Store	Index of Purchases (1930 = 100)
			$	$	
1930	23	4,472	22,720,502	5,081	100.0
1931	26	5,198	23,626,795	4,545	104.0
1932	26	5,790	25,433,064	4,392	111.9
1933	27	6,025	26,725,418	4,436	117.6
1934	23	5,659	26,842,228	4,743	118.1

Table 3.--Principal Statistics of Food Chains by Provinces, 1930 - 1934

(Grocery, Combination and Meat Market Chains Combined)

	1930	1931	1932	1933	1934
CANADA, Total(1) --					
Number of chains	87	90	90	91	86
Number of stores (maximum)	2,352	2,410	2,436	2,398	2,395
Net chain sales	$127,582,500	$123,752,500	$109,815,200	$103,638,500	$104,912,800
Index of chain sales, 1930 = 100	100.00	97.00	86.07	81.23	82.23
Total sales	$488,429,600	$426,908,000	$369,420,000	$347,397,000	$363,056,000
Per cent, chains to total	26.1	29.0	29.7	29.8	28.9
British Columbia --					
Number of chains	19	19	18	17	18
Number of stores (maximum)	244	249	268	282	305
Net chain sales	$ 10,117,100	$ 9,174,400	$ 8,470,200	$ 8,862,400	$ 9,165,300
Index of chain sales, 1930 = 100	100.00	90.68	83.72	87.60	90.59
Total sales	$ 37,196,100	$ 31,163,000	$ 25,912,000	$ 24,455,000	$ 25,737,000
Per cent, chains to total	27.2	29.4	32.7	36.2	35.6
Alberta --					
Number of chains	8	9	10	11	10
Number of stores (maximum)	120	117	122	127	128
Net chain sales	$ 5,587,000	$ 5,356,200	$ 4,877,000	$ 4,519,100	$ 4,777,300
Index of chain sales, 1930 = 100	100.00	95.87	87.29	80.89	85.51
Total sales	$ 23,469,400	$ 19,492,000	$ 16,997,000	$ 15,970,000	$ 17,143,000
Per cent, chains to total	23.8	27.5	28.7	28.3	27.9
Saskatchewan --					
Number of chains	10	10	9	8	6
Number of stores (maximum)	165	162	153	138	133
Net chain sales	$ 6,969,300	$ 6,307,800	$ 4,963,700	$ 4,177,600	$ 4,168,600
Index of chain sales, 1930 = 100	100.00	90.51	71.22	59.94	59.81
Total sales	$ 21,690,500	$ 17,636,000	$ 14,310,000	$ 13,109,000	$ 13,369,000
Per cent, chains to total	32.1	35.8	34.7	31.9	31.2
Manitoba --					
Number of chains	8	8	8	6	5
Number of stores (maximum)	121	119	118	110	109
Net chain sales	$ 5,689,100	$ 5,486,600	$ 5,432,100	$ 4,697,600	$ 4,895,200
Index of chain sales, 1930 = 100	100.00	96.44	95.48	82.57	86.04
Total sales	$ 22,225,200	$ 18,889,000	$ 17,082,000	$ 15,480,000	$ 16,016,000
Per cent, chains to total	25.6	29.0	31.8	30.3	30.6

Table 3.--Principal Statistics of Food Chains by Provinces, 1930 - 1934 (Cont'd.) -

(Grocery, Combination and Meat Market Chains Combined)

	1930	1931	1932	1933	1934
Ontario --					
Number of chains	37	37	36	37	36
Number of stores (maximum)	1,107	1,109	1,114	1,113	1,086
Net chain sales	$ 70,769,300	$ 67,093,400	$ 58,639,900	$ 55,450,700	$ 56,563,500
Index of chain sales, 1930 = 100	100.00	94.81	82.86	78.35	79.93
Total sales	$206,749,300	$179,622,000	$154,793,000	$146,528,000	$154,842,000
Per cent, chains to total	$ 34.2	37.4	37.9	37.8	36.5
Quebec --					
Number of chains	13	12	12	12	12
Number of stores (maximum)	495	523	515	472	483
Net chain sales	$ 23,708,400	$ 24,194,600	$ 21,665,400	$ 20,456,500	$ 19,759,700
Index of chain sales, 1930 = 100	100.00	102.05	91.38	86.28	83.34
Total sales	$140,527,500	$126,553,000	$110,798,000	$104,204,000	$106,708,000
Per cent, chains to total	16.9	19.1	19.6	19.6	18.5
New Brunswick --					
Number of chains	5	5	5	5	6
Number of stores (maximum)	30	37	39	41	43
Net chain sales	$ 1,267,300	$ 1,675,700	$ 1,620,200	$ 1,519,900	$ 1,441,000
Index of chain sales, 1930 = 100	100.00	132.22	127.85	119.93	113.71
Total sales	$ 13,117,200	$ 11,618,000	$ 10,298,000	$ 9,638,000	$ 10,014,000
Per cent, chains to total	9.7	14.4	15.7	15.8	14.4
Nova Scotia --					
Number of chains	9	11	12	14	12
Number of stores (maximum)	66	92	105	113	105
Net chain sales	$ 3,189,100	$ 4,288,400	$ 4,004,000	$ 3,844,700	$ 3,954,700
Index of chain sales, 1930 = 100	100.00	134.47	125.55	120.56	124.01
Total sales	$ 21,248,900	$ 19,916,000	$ 17,385,000	$ 16,313,000	$ 17,372,000
Per cent, chains to total	15.0	21.5	23.0	23.6	22.8

(1) Includes Prince Edward Island, Yukon and Northwest Territories.

Table 4.--Distribution of Food Chain Stores and Sales by Provinces and Size of Locality, 1934

(Grocery, Combination and Meat Market Chains Combined)

	All Localities			Stores and Sales in Places With Population Of - 100,000 or more			30,000 - 100,000		
	Stores	Sales	Per cent of Dominion chain sales	Stores	Sales	Per cent of Dominion and provincial totals	Stores	Sales	Per cent of Dominion and provincial totals
		$			$			$	
CANADA, Total ..	2,395	104,912,800	100.00	1,092	49,469,000	47.15	334	13,804,900	13.16
Northwest Territories and Yukon	2	(X)	(X)	-	-	-	-	-	-
British Columbia	305	9,165,300	8.74	188	5,217,000	56.92	13	518,600	5.66
Alberta	128	4,777,300	4.55	-	-	-	76	2,952,700	61.81
Saskatchewan	133	4,168,600	3.97	-	-	-	37	1,398,700	33.55
Manitoba	109	4,895,200	4.67	82	3,617,000	73.89	-	-	-
Ontario	1,086	56,563,500	53.91	490	26,361,100	46.60	101	4,904,900	8.67
Quebec	483	19,759,700	18.83	332	14,273,900	72.24	48	1,871,700	9.47
New Brunswick	43	1,441,000	1.37	-	-	-	17	680,200	47.20
Nova Scotia	105	3,954,700	3.77	-	-	-	42	1,478,100	37.38
Prince Edward Island.	1	(X)	(X)	-	-	-	-	-	-

	10,000 - 30,000			1,000 - 10,000			Less than 1,000		
		$			$			$	
CANADA, Total ..	291	16,694,500	15.91	478	19,097,500	18.20	200	5,846,900	5.58
Northwest Territories and Yukon	-	-	-	-	-	-	2	(X)	(X)
British Columbia	12	536,000	5.85	50	1,737,400	18.96	42	1,156,300	12.61
Alberta	6	378,700	7.93	30	1,017,600	21.30	16	428,300	8.96
Saskatchewan	11	536,600	12.87	39	1,440,500	34.56	46	792,800	19.02
Manitoba	3	(X)	(X)	14	826,100	16.88	10	(X)	(X)
Ontario	194	12,283,500	21.72	240	10,348,600	18.30	61	2,665,400	4.71
Quebec	46	1,816,200	9.19	43	1,530,500	7.75	14	267,400	1.35
New Brunswick	4	(X)	(X)	20	603,100	41.85	2	(X)	(X)
Nova Scotia	14	730,200	18.46	42	1,593,700	40.30	7	152,700	3.86
Prince Edward Island.	1	(X)	(X)	-	-	-	-	-	-

An (X) indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 5.--Food Chain Stores and Sales by Provinces and Principal Cities, 1930 and 1934

Province and City	Number of Stores 1930	Number of Stores 1934	Value of Sales 1930 $	Value of Sales 1934 $	Per Cent of Change
CANADA, Total(1)	2,352	2,393	127,582,500	104,912,800	-17.77
Places 30,000 and over, total	1,365	1,426	73,464,800	63,273,900	-13.87
Places under 30,000, total	985	967	54,117,700	41,568,400	-23.19
British Columbia, total	244	305	10,117,100	9,165,300	- 9.41
Places 30,000 and over, total	155	201	5,961,900	5,735,600	- 3.80
Vancouver	142	188	5,438,000	5,217,000	- 4.06
Victoria	13	13	523,900	518,600	- 1.01
Places under 30,000, total	89	104	4,155,200	3,429,700	-17.46
Alberta, total	120	128	5,587,000	4,777,300	-14.49
Places 30,000 and over, total	67	76	3,055,400	2,952,700	- 3.36
Calgary	46	57	2,042,100	2,180,600	+ 6.78
Edmonton	21	19	1,013,300	772,100	-23.80
Places under 30,000, total	53	52	2,531,600	1,824,600	-27.93
Saskatchewan, total	165	133	6,969,300	4,168,600	-40.19
Places 30,000 and over, total	48	37	2,197,100	1,398,700	-36.34
Regina	26	25	1,139,600	930,700	-18.33
Saskatoon	22	12	1,057,500	468,000	-55.75
Places under 30,000, total	117	96	4,772,200	2,769,900	-41.96
Manitoba, total	121	109	5,689,100	4,895,200	-13.95
Winnipeg	81	82	3,602,600	3,617,000	+ .40
Places under 30,000, total	40	27	2,086,500	1,278,200	-38.74
Ontario, total	1,107	1,086	70,769,300	56,563,500	-20.07
Places 30,000 and over, total	616	591	39,665,400	31,266,000	-21.18
Brantford	11	15	869,400	932,700	+ 7.28
Hamilton	104	126	5,270,200	4,528,200	-14.08
Kitchener	8	7	804,500	596,300	-25.88
London	23	21	1,825,200	1,217,400	-33.30
Ottawa	80	55	3,515,800	2,940,000	-16.38
Toronto	318	309	24,159,000	18,892,900	-21.80
Windsor	74	58	3,221,500	2,158,500	-33.00
Places under 30,000, total	489	495	31,103,900	25,297,500	-18.67
Quebec, total	495	483	23,708,400	19,759,700	-16.66
Places 30,000 and over, total	362	380	17,476,300	16,145,600	- 7.61
Montreal	274	291	13,586,700	13,370,300	- 1.59
Quebec	37	41	1,540,600	903,600	-41.35
Three Rivers	6	7	(X)	(X)	+48.17
Verdun	45	41	(X)	(X)	-27.71
Places under 30,000, total	133	103	6,232,100	3,614,100	-42.01
New Brunswick and Nova Scotia, total	96	148	4,456,400	5,395,700	+21.08
Places 30,000 and over, total	34	59	1,506,100	2,158,300	+43.30
Halifax	24	42	887,300	1,478,100	+66.58
St. John	10	17	618,800	680,200	+ 9.92
Places under 30,000, total	62	89	2,950,300	3,237,400	+ 9.73

(1) Includes Prince Edward Island, Yukon and Northwest Territories.
An (X) indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 6.--Gross Margins for Grocery Chains, 1934

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Chain Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Sales
			$		$	$	
ALL CHAINS, Total	40	719	37,390,600	100.00	52,004	6,570,800	17.57
Local Chains	27	294	12,279,800	32.84	41,768	1,857,100	15.12
Provincial and Sectional Chains	13	425	25,110,800	67.16	59,084	4,713,700	18.77

B. Chains Classified According to Number of Stores

			$		$	$	
ALL CHAINS, Total	40	719	37,390,600	100.00	52,004	6,570,800	17.57
Chains having -							
Less than 6 stores	11	47	2,452,000	6.56	52,170	367,200	14.98
6 - 10 stores	14	98	3,439,100	9.20	35,093	564,700	16.42
11 - 50 stores	12	277	9,365,200	25.05	33,809	1,699,300	18.14
More than 50 stores	3	297	22,134,300	59.19	74,526	3,939,600	17.80

C. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	40	719	37,390,600	100.00	52,004	6,570,800	17.57
Chains having sales of -							
Less than $200,000	15	85	2,185,600	5.85	25,713	320,500	14.66
$200,000 - $1,000,000	17	197	6,750,100	18.05	34,264	1,068,900	15.84
More than $1,000,000	8	437	28,454,900	76.10	65,114	5,181,400	18.21

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.

Table 7.--Gross Margins for Combination Store Chains, 1934

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Chain Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Sales
			$		$	$	
ALL CHAINS, Total	34	1,440	63,484,300	100.00	44,086	12,304,700	19.38
Local Chains	17	108	4,179,200	6.58	38,696	847,900	20.29
Provincial Chains	10	160	6,259,400	9.86	39,121	1,258,100	20.10
Sectional and National Chains	7	1,172	53,045,700	83.56	45,260	10,198,700	19.23

B. Chains Classified According to Number of Stores

			$		$	$	
ALL CHAINS, Total	34	1,440	63,484,300	100.00	44,086	12,304,700	19.38
Chains having -							
Less than 6 stores	13	54	2,504,500	3.95	46,380	551,700	22.03
6 - 10 stores	10	73	3,305,800	5.21	45,285	618,200	18.70
11 - 50 stores	5	99	3,823,800	6.02	38,624	722,800	18.90
More than 50 stores	6	1,214	53,850,200	84.82	44,358	10,412,000	19.34

C. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	34	1,440	63,484,300	100.00	44,086	12,304,700	19.38
Chains having sales of -							
Less than $200,000	14	70	1,956,700	3.08	27,953	420,000	21.46
$200,000 - $1,000,000	12	119	4,286,500	6.75	36,021	840,100	19.60
More than $1,000,000	8	1,251	57,241,100	90.17	45,756	11,044,600	19.29

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.

Table 8.--Gross Margins for Meat Market Chains, 1934

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Chain Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Sales
			$		$	$	
ALL CHAINS, Total	12	151	4,037,900	100.00	26,741	964,900	23.90
Local Chains	7	44	1,648,800	40.83	37,473	385,100	23.36
Provincial and Sectional Chains	5	107	2,389,100	59.17	22,328	579,800	24.27

B. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	12	151	4,037,900	100.00	26,741	964,900	23.90
Chains having sales of -							
Less than $200,000	6	29	645,300	15.98	22,252	159,900	24.78
$200,000 - $1,000,000	6	122	3,392,600	84.02	27,808	805,000	23.73

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA

1935

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS.

FOOD CHAINS IN CANADA, 1935

This report, based upon returns received for the annual Census of Merchandising and Service Establishments, presents a summary of the business transacted by food chains in Canada in 1935, together with comparative figures for earlier years. The food chains included here are grocery store chains, combination store chains (those selling both groceries and meats) and meat market chains.

There were 86 food chain companies in Canada in 1935 with 2,309 stores and $105,635,900 sales compared with a like number of chains with 2,395 stores and $104,912,800 sales in 1934. These figures show but slight variations from those given in a preliminary bulletin issued earlier in the year. A decline in the number of food chain firms due to the removal of seven companies from the field was offset by the introduction of seven new concerns, leaving the total number of food chains in 1935 unchanged from 1934. During the one-year interval, a total of 176 unit stores were removed from the field while 90 new units were added, resulting in a net decrease of 86 stores. In spite of this reduction in number of units, a slight increase in aggregate sales over the preceding year was recorded, indicating a more substantial increase in business on the part of the continuing stores. The 86 food chains included 38 grocery store chains with 611 stores and $23,870,900 sales. There were 35 combination store chains with 1,540 stores and $77,547,500 sales. Of course, a great many of these combination store chains operate many straight grocery units in addition to those of the combination type. Of the 1,540 stores operated by combination chains, 681 were straight grocery units and these had total sales of $25,-710,500 or an average of $37,754 each; the remaining 839 stores sold both groceries and fresh meats and these had total sales of $51,377,900 or an average of $61,237 each. An analysis of the types of stores operated by these chains and given in Table 2 shows that units of the smaller combination store chains are practically all of the combination type while the units of the five largest companies are about equally divided between combination and purely grocery units. In all cases, however, average sales per store are greater for the combination stores than for the straight grocery units.

There were also 13 meat market chains with 158 stores and $4,217,-500 sales.

A comparison of chain sales and total food store sales for 1935 indicates a slight reduction in the proportion of total business transacted by chains. The 86 food chains transacted 28.5 per cent of the total business of all grocery and combination stores and meat markets in 1935; corresponding chain ratios for earlier years are 28.9 per cent for 1934, 29.8 per cent for 1933 and 26.1 per cent for 1930. Since there are comparatively few strictly meat market chains in Canada, these ratios of chain sales to total sales are considerably smaller than they would be if figures for all meat markets, including chains and independents, were excluded from the calculations. When grocery and combination stores only are considered, the ratio of chain sales to total sales was 32.5 per cent in 1935 compared with 32.8 per cent in 1934, 33.3 per cent in 1933 and 29.5 per cent in 1930. It must be remembered that all comparisons between chain and total sales are based on the total sales of these stores and not upon the sales of selected commodities. Many stores, in addition to the three types of stores analyzed in this report, sell food products. Thus,

while it is true that food chains transacted 28.5 per cent of the total business of all similar stores in 1935, no information is available to show what proportion of the total sale of food products through all retail channels of distribution is made by chains. A comparison of food chain sales and total food store sales is given in the following table which shows the ratio of chain sales to the total trade for grocery and combination stores and meat markets combined, and then for grocery and combination stores only.

Comparison of Food Chain Store Sales With Total Food Store Sales, by Years

Year	Grocery and Combination Stores and Meat Markets			Grocery and Combination Stores		
	All Stores, Total Sales	Chain Store Sales	Chain Ratio	All Stores, Total Sales	Chain Store Sales	Chain Ratio
	$	$	%	$	$	%
1930	488,429,600	127,582,500	26.1	405,403,400	119,498,600	29.5
1933	347,397,000	103,638,500	29.8	297,307,000	98,862,100	33.3
1934	363,056,000	104,912,800	28.9	307,478,000	100,874,900	32.8
1935	370,909,000	105,635,900	28.5	312,197,000	101,418,400	32.5

Employment and Wages in Food Chains.--The 86 food chains operating in 1935 required the services of 10,544 male and 1,722 female employees, to whom $8,094,500 were paid in salaries and wages. These figures relate to all store employees, both part-time and full-time, but they do not include head office or warehouse employees or payroll. A comparison of sales, employment and wages for 1934 and 1935 shows that, while sales increased by .7 per cent, the average number of employees declined slightly by 1.2 per cent and the total store wage bill increased by 1.7 per cent.

Trends in Food Chain Sales by Provinces.--Increases of almost 10 per cent in food chain sales in 1935 over 1934 were reported in British Columbia, Alberta and Saskatchewan, but these were largely offset by decreases in New Brunswick and Quebec, resulting in a net increase of only .7 per cent for the Dominion as a whole. The different provinces, together with the corresponding percentage changes in food chain sales between the two years, are as follows: Alberta, + 9.9 per cent; British Columbia, + 9.9 per cent; Saskatchewan, + 9.4 per cent; Nova Scotia, + 4.2 per cent: Manitoba, - 1.7 per cent; Quebec, - 4.8 per cent, and New Brunswick, - 9.2 per cent.

Comparison of Chain Stores and Sales for Principal Cities, by Years, 1934 and 1935

In Table 4 comparative figures for 1934 and 1935 are summarized to show the number of food chain stores and value of sales for each city of 30,000 population or more as well as for all places of lesser size combined within each province or division. Percentage change in chain store sales as shown for the various cities reflect changes both in the amount of business done by continuing stores and also in the number of units operating in the two years. For this reason, changes in chain sales cannot be taken as representative of trends in total food store sales. Also, since many of these stores were opened or closed during the years for which figures are shown, too much significance cannot be placed upon changes in average sales per store as derived from the total number of stores and value of sales shown in the table.

Increases in food chain sales were greatest in Edmonton, Saskatoon, Victoria and Vancouver, while smaller increases were reported in other five cities of 30,000 population or more. Due to the removal of two companies from the chain store field, a pronounced decrease in chain sales was recorded in Quebec City. A large decline of 19.27 per cent was also reported for St. John, while smaller decreases were reported in nine other cities. Food chain sales in all places of 30,000 population as a whole were 1.08 per cent lower in 1935 than in 1934 while in smaller localities sales were up by 3.31 per cent.

GROSS MARGINS FOR FOOD CHAINS

Gross margin for all food chains as a whole formed 19.22 per cent of sales in 1935 compared with a slightly lower figure or 18.91 per cent in 1934. The gross margin percentage in 1935 was 15.98 per cent for grocery chains, 19.99 per cent for combination store chains and 23.58 per cent for meat market chains.

For the second consecutive year, data relating to gross margin have been secured from chain and independent concerns. The term "gross margin" is used here to represent the amount remaining after deducting the net cost of goods sold from net sales. The net cost of goods sold is calculated from the net cost of goods purchased during the year and from the inventory values at the beginning and close of the period. The net cost of goods purchased includes the invoice value less all returns, allowances and discounts, plus inward freight, cartage to warehouse, duty, insurance in transit, and other expenses incidental to receipt of merchandise. Warehousing charges and costs of transportation from warehouses to stores are not included in the purchase price and all operating expenses are, of course, excluded. Transportation costs of goods shipped directly from wholesalers or manufacturers to the retail stores were to be included in the value of purchases.

Most of the larger chain store companies, in addition to performing the duties of retailers, carry on the work of wholesalers in so far as the physical handling of merchandise is concerned. It should be noted that the difference between the cost of goods sold and the value of net sales as reported by any chain company for the Census of Merchandising represents the gross margin for the entire organization rather than that margin or profit which might be considered applicable to the retailing function only. In a few instances, food chains indicated that their warehouse carried on a small amount of wholesale business in addition to supplying their own stores. Since the value of purchases included both goods bought for their own stores and also for resale at wholesale, the gross margin percentages shown herein are based upon the aggregate sales through retail stores together with any sales at wholesale direct from the warehouse to other retailers.

Grocery Chains.--Gross margin for grocery store chains formed 15.98 per cent of net sales in 1935 compared with 17.57 per cent in 1934. An accurate comparison between the two years is not valid, however, on account of the reclassification of firms as between grocery chains and combination store chains in the two years. A classification of the grocery chains according to type of operation shows that gross margin was 15.58 per cent of sales for local chains in 1935 and 16.37 per cent for provincial and sectional chains. When classified according to number of stores, gross margin varied from 14.35 per cent for the smaller companies with fewer than six stores to 17.42 per cent for a group of three chain companies each with more than 40 units. A further classification according to amount of annual sales also shows the smaller concerns to operate on a smaller gross margin than the larger firms. It must be remembered in this connection that the smaller chains are retailers only, while the larger companies perform the functions of retailers and, to some extent, those of wholesalers also.

Combination Store Chains.--Gross margin for all combination store chains formed 19.99 per cent of net sales in 1935 compared with 19.38 per cent in 1934. All combination store chains do not carry on the same proportions of grocery and meat business and gross margin percentage is normally higher for meat than for grocery sales. On account of this lack of homogeneity in the various companies, an exact relationship between size of chain and gross margin percentage is not to be expected. In spite of this lack of homogeneity, however, Table 6 reveals a fairly definite tendency for gross margin to increase as the size of chain increases.

Meat Market Chains.--Gross margin for meat market chains averaged 23.58 per cent of net sales in 1935 compared with 23.90 per cent in 1934. The ratio was 23.01 per cent for local chains and 24.04 per cent for provincial and sectional chains; it was 23.54 per cent for chains of less than $200,000 and approximately the same figure or 23.59 per cent for

hains doing an annual business of more than $200,000. Meat market chains, rrespective of size, perform the functions of wholesalers to but a very imited extent. For this reason, an increase in gross margin percentage of et sales as the size of chain increases was not to be expected.

ACCOUNTS OUTSTANDING AT END OF YEAR

Accounts outstanding on the books of food chains on December 31, 935, totalled $1,177,000 or 1.1 per cent of the total annual sales. In ddition to customers' accounts, this amount may represent, to some extent, oney owing by municipalities on relief vouchers. The comparatively small mount outstanding on the books of these food chains is indicative of the estricted credit business carried on. Comparative figures for independent tores operating in the food store field show that the amount of customers' ccounts outstanding on their books at the end of the year formed 7.9 per ent of their total annual business.

VOLUNTARY CHAINS

In connection with the annual Census of Merchandising, the Bureau f Statistics endeavours to secure information relating to the extent of the oluntary chain business in Canada. While no information is available to how the total amount of business transacted by the members of these volunary chains, data are secured to show the value of sales at wholesale prices ade by the affiliated wholesalers to these members. An exact statistical easurement of the trend in voluntary chains is rendered impossible by the ndefinite nature of some groups and the difficulty in determining when thers should be considered as voluntary chains. Some wholesalers which reviously stated that they were affiliated with these buying groups now tate that they now render the same concessions to all their clients.

According to the reports received, there were 29 different buying roups in Canada in 1935 with a total of 6,465 members, and purchases at holesale prices from the affiliated companies totalled $27,525,349. Comarative figures for earlier years are given in Table 8.

Table 1.--Summary of Food Chain Stores in Canada, 1935

	Total Food Chains	Grocery Chains	Combination Store Chains	Meat Market Chains
Number of chains	86	38	35	13
Number of stores, average(1)	2,241	592	1,498	151
Number of stores, maximum	2,309	611	1,540	158
Net sales, 1935: Store sales ..	$105,635,900	$23,870,900	$77,547,500	$4,217,500
Total sales(2)	$106,531,600	$24,385,900	$77,928,200	$4,217,500
Stocks on hand, end of year, at cost --				
In retail stores	$ 6,046,900	$ 1,683,100	$ 4,255,000	$ 108,800
In warehouses	$ 3,530,600	$ 743,700	$ 2,777,400	$ 9,500
Gross margin, amount	$ 20,473,000	$ 3,897,200	$15,581,300	$ 994,500
Per cent of total sales	19.22	15.98	19.99	23.58
Average number of store employees (includes full-time and part-time) --				
Male	10,544	1,755	8,197	592
Female	1,722	670	1,025	27
Salaries and wages	$ 8,094,500	$ 1,633,500	$ 6,005,200	$ 455,800
Total accounts outstanding on December 31 --				
Amount	$ 1,177,000	$ 331,700	$ 709,500	$ 135,800
Per cent of total sales	1.1	1.4	.8	3.1

(1) Derived from number of units at beginning, middle and end of year.
(2) Includes any sales at wholesale prices direct from warehouses.

Table 2.--Kinds of Stores Operated by Combination Store Chains in 1935

Size of Chain	Number of Chains	Total Units(1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
			$		$		$
All Combination Store Chains, Total	35	1,540	77,547,500	681	25,710,500	839	51,377,900
Chains having --							
Less than 10 units.	23	134	5,901,000	9	181,700	116	5,484,200
10 to 99 units	7	199	8,063,900	70	2,313,900	119	5,551,000
100 units and over.	5	1,207	63,582,600	602	23,214,900	604	40,342,700

(1) These figures include a few stores other than grocery and combination stores.

Table 3.--Principal Statistics of Food Chains by Provinces, 1930 - 1935
(Grocery, Combination and Meat Market Chains Combined)

	1930	1932	1933	1934	1935
ANADA, Total(1) --					
Number of chains	87	90	91	86	86
No. of stores (maximum)	2,352	2,436	2,398	2,395	2,309
Net chain sales, amount	$127,582,500	$109,815,200	$103,638,500	$104,912,800	$105,635,900
Index, 1930 = 100 ...	100.00	86.07	81.23	82.23	82.80
Total sales	$488,429,600	$369,420,000	$347,397,000	$363,056,000	$370,909,000
%, chains to total	26.1	29.7	29.8	28.9	28.5
ritish Columbia --					
Number of chains	19	18	17	18	17
No. of stores (maximum)	244	268	282	305	295
Net chain sales, amount	$ 10,117,100	$ 8,470,200	$ 8,862,400	$ 9,165,300	$ 10,069,200
Index, 1930 = 100 ...	100.00	83.72	87.60	90.59	99.53
Total sales	$ 37,196,100	$ 25,912,000	$ 24,455,000	$ 25,737,000	$ 27,788,000
%, chains to total	27.2	32.7	36.2	35.6	36.2
lberta --					
Number of chains	8	10	11	10	11
No. of stores (maximum)	120	122	127	128	130
Net chain sales, amount	$ 5,587,000	$ 4,877,000	$ 4,519,100	$ 4,777,300	$ 5,250,900
Index, 1930 = 100 ...	100.00	87.29	80.89	85.51	93.98
Total sales	$ 23,469,400	$ 16,997,000	$ 15,970,000	$ 17,143,000	$ 18,096,000
%, chains to total	23.8	28.7	28.3	27.9	29.0
askatchewan --					
Number of chains	10	9	8	6	6
No. of stores (maximum)	165	153	138	133	131
Net chain sales, amount	$ 6,969,300	$ 4,963,700	$ 4,177,600	$ 4,168,600	$ 4,558,500
Index, 1930 = 100 ...	100.00	71.22	59.94	59.81	65.41
Total sales	$ 21,690,500	$ 14,310,000	$ 13,109,000	$ 13,369,000	$ 13,808,000
%, chains to total	32.1	34.7	31.9	31.2	33.0
anitoba --					
Number of chains	8	8	6	5	5
No. of stores (maximum)	121	118	110	109	106
Net chain sales, amount	$ 5,689,100	$ 5,432,100	$ 4,697,600	$ 4,895,200	$ 4,813,800
Index, 1930 = 100 ...	100.00	95.48	82.57	86.04	84.61
Total sales	$ 22,225,200	$ 17,082,000	$ 15,480,000	$ 16,016,000	$ 16,555,000
%, chains to total	25.6	31.8	30.3	30.6	29.1
ntario --					
Number of chains	37	36	37	36	37
No. of stores (maximum)	1,107	1,114	1,113	1,086	1,075
Net chain sales, amount	$ 70,769,300	$ 58,639,900	$ 55,450,700	$ 56,563,500	$ 56,515,600
Index, 1930 = 100 ...	100.00	82.86	78.35	79.93	79.86
Total sales	$206,749,300	$154,793,000	$146,528,000	$154,842,000	$156,730,000
%, chains to total	34.2	37.9	37.8	36.5	36.1
uebec --					
Number of chains	13	12	12	12	11
No. of stores (maximum)	495	515	472	483	425
Net chain sales, amount	$ 23,708,400	$ 21,665,400	$ 20,456,500	$ 19,759,700	$ 18,809,400
Index, 1930 = 100 ...	100.00	91.38	86.28	83.34	79.34
Total sales	$140,527,500	$110,798,000	$104,204,000	$106,708,000	$107,634,000
%, chains to total	16.9	19.6	19.6	18.5	17.5
ew Brunswick --					
Number of chains	5	5	5	6	5
No. of stores (maximum)	30	39	41	43	36
Net chain sales, amount	$ 1,267,300	$ 1,620,200	$ 1,519,900	$ 1,441,000	$ 1,308,400
Index, 1930 = 100 ...	100.00	127.85	119.93	113.71	103.24
Total sales	$ 13,117,200	$ 10,298,000	$ 9,638,000	$ 10,014,000	$ 10,301,000
%, chains to total	9.7	15.7	15.8	14.4	12.7
ova Scotia --					
Number of chains	9	12	14	12	13
No. of stores (maximum)	66	105	113	105	108
Net chain sales, amount	$ 3,189,100	$ 4,004,000	$ 3,844,700	$ 3,954,700	$ 4,120,900
Index, 1930 = 100 ...	100.00	125.55	120.56	124.01	129.22
Total sales	$ 21,248,900	$ 17,385,000	$ 16,313,000	$ 17,372,000	$ 18,075,000
%, chains to total	15.0	23.0	23.6	22.8	22.8

(1) Includes Prince Edward Island, Yukon and Northwest Territories.

Table 4.--Food Chain Stores and Sales by Provinces and Principal Cities, 1934 and 1935

Province and City	Number of Stores		Value of Sales		
	1934	1935	1934	1935	Per Cent of Change
			$	$	
CANADA, Total(1)	2,[illegible]25	2,309	104,912,800	105,635,900	+ .69
Places 30,000 and over, total ...	1,425	1,331	62,595,300	61,919,500	- 1.08
Places under 30,000, total	970	978	42,317,500	43,716,400	+ 3.31
British Columbia, Total	305	295	9,165,300	10,069,200	+ 9.86
Places 30,000 and over, total ...	201	188	5,735,600	6,335,100	+ 10.45
Vancouver	188	176	5,217,000	5,753,600	+ 10.29
Victoria	13	12	518,600	581,500	+ 12.13
Places under 30,000, total	104	107	3,429,700	3,734,100	+ 8.88
Alberta, Total	128	130	4,777,300	5,250,900	+ 9.91
Places 30,000 and over, total ...	76	78	2,952,700	3,300,100	+ 11.77
Calgary	57	54	2,180,600	2,328,400	+ 6.78
Edmonton	19	24	772,100	971,700	+ 25.85
Places under 30,000, total	52	52	1,824,600	1,950,800	+ 6.92
Saskatchewan, Total ...	133	131	4,168,600	4,558,500	+ 9.35
Places 30,000 and over, total ...	37	34	1,398,700	1,567,200	+ 12.05
Regina	25	21	(X)	(X)	
Saskatoon	12	13	(X)	(X)	
Places under 30,000, total	96	97	2,769,900	2,991,300	+ [illegible]
Manitoba, Total	109	106	4,895,200	4,813,800	- 1.66
Winnipeg	82	81	3,617,000	3,541,600	- 2.08
Places under 30,000, total	27	25	1,278,200	1,272,200	- .47
Ontario, Total	1,086	1,075	56,563,500	56,515,600	- .08
Places 30,000 and over, total ...	614	593	32,066,500	31,281,400	- 2.45
Brantford	15	14	932,700	903,100	- 3.17
Hamilton	126	129	4,528,200	4,649,800	+ 2.69
Kitchener	7	6	596,300	560,500	- 6.00
London	21	22	1,217,400	1,246,800	+ 2.41
Ottawa	55	53	2,940,000	2,915,500	- .83
Toronto	307	294	18,719,800	17,943,600	- 4.15
Windsor	83	75	3,132,100	3,062,100	- 2.23
Places under 30,000, total	472	482	24,497,000	25,234,200	+ 3.01
Quebec, Total	483	425	19,759,700	18,809,400	- 4.81
Places 30,000 and over, total ...	356	305	14,666,500	13,853,500	- 5.54
Montreal	264	249	11,812,100	11,606,700	- 1.74
Quebec	41	7	(X)	(X)	(X)
Three Rivers	7	9	(X)	(X)	(X)
Verdun	44	40	1,611,800	1,674,100	+ 3.87
Places under 30,000, total	128	120	5,093,200	4,955,900	- 2.70
New Brunswick and Nova Scotia, Total	148	144	5,395,700	5,429,300	+ .62
Places 30,000 and over, total ...	59	52	2,158,300	2,040,600	- 5.45
Halifax	42	41	1,478,100	1,491,500	+ .91
St. John	17	11	680,200	549,100	- 19.27
Places under 30,000, total	89	92	3,237,400	3,388,700	+ 4.67

(1) Includes Prince Edward Island, Yukon and Northwest Territories.
An (X) indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 5.--Gross Margins for Grocery Chains, 1935

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	38	592	23,870,900	100.00	40,322	3,897,200	15.98
Local Chains	25	263	11,515,000	48.24	43,783	1,871,100	15.58
Provincial and Sectional Chains	13	329	12,355,900	51.76	37,556	2,026,100	16.37

B. Chains Classified According to Number of Stores

			$		$	$	
ALL CHAINS, Total	38	592	23,870,900	100.00	40,322	3,897,200	15.98
Chains having -							
Less than 6 stores	12	50	1,964,700	8.23	39,294	281,900	14.35
6 - 10 stores	12	82	4,039,000	16.92	49,256	655,300	16.20
11 - 40 stores	11	235	9,573,500	40.11	40,738	1,473,800	14.97
More than 40 stores	3	225	8,293,700	34.74	36,861	1,486,200	17.42

C. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	38	592	23,870,900	100.00	40,322	3,897,200	15.98
Chains having sales of -							
Less than $200,000	16	88	2,276,600	9.54	25,870	336,200	14.77
$200,000 - $1,000,000	14	170	5,521,900	23.13	32,482	871,300	15.30
More than $1,000,000	8	334	16,072,400	67.33	48,121	2,689,700	16.38

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.
(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 6.--Gross Margins for Combination Store Chains, 1935

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	35	1,498	77,547,500	100.00	51,767	15,581,300	19.99
Local Chains	12	72	3,603,700	4.65	50,051	634,700	17.61
Provincial Chains	16	259	21,176,600	27.31	81,763	4,389,200	20.53
Sectional and National Chains	7	1,167	52,767,200	68.04	45,216	10,557,400	19.94

B. Chains Classified According to Number of Stores

			$		$	$	
ALL CHAINS, Total	35	1,498	77,547,500	100.00	51,767	15,581,300	19.99
Chains having -							
Less than 6 stores	13	57	3,012,200	3.88	52,846	535,700	17.78
6 - 10 stores	11	81	3,190,400	4.12	39,388	601,300	18.76
11 - 50 stores	4	60	2,024,000	2.61	33,733	363,400	17.68
More than 50 stores	7	1,300	69,320,900	89.39	53,324	14,080,900	20.21

C. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	35	1,498	77,547,500	100.00	51,767	15,581,300	19.99
Chains having sales of -							
Less than $200,000	12	62	1,777,500	2.29	28,669	310,200	17.45
$200,000 - $1,000,000	15	115	5,409,500	6.98	47,039	993,500	18.21
More than $1,000,000	8	1,321	70,360,500	90.73	53,263	14,277,600	20.20

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.

(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 7.--Gross Margins for Meat Market Chains, 1935

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	13	151	4,217,500	100.00	27,930	994,500	23.58
Local Chains	8	51	1,881,600	44.61	36,894	433,000	23.01
Provincial and Sectional Chains	5	100	2,335,900	55.39	23,359	561,500	24.04

B. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	13	151	4,217,500	100.00	27,930	994,500	23.58
Chains having sales of -							
Less than $200,000	6	28	703,000	16.67	25,107	165,500	23.54
$200,000 - $1,000,000	7	123	3,514,500	83.33	28,573	829,000	23.59

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.
(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 8.--Voluntary Food Chains in Canada, 1930 - 1935

(Number of Chains, Stores, Value of Purchases and Average Purchases Per Store)

Year	Number of Chains	Number of Stores	Total Purchases by Members (at Wholesale Prices)	Average Purchases Per Store	Index of Purchases (1930 = 100)
			$	$	
1930	23	4,472	22,720,502	5,081	100.0
1931	26	5,198	23,626,795	4,545	104.0
1932	26	5,790	25,433,064	4,392	111.9
1933	27	6,025	26,725,418	4,436	117.6
1934	23	5,659	26,842,228	4,743	118.1
1935	29	6,465	27,525,349	4,258	121.1

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA

1936

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Food Chains in Canada, 1936

The proportion of the total food store business in Canada which is transacted by chains, after declining slightly from 28.9 per cent in 1934 to 28.5 per cent in 1935, increased again to 28.9 per cent in 1936 when 89 different chain store companies with 2,334 stores had $111,511,900 sales. In 1935 there were 86 food chain companies with 2,309 stores and $105,635,900 sales while in 1930, the first year for which statistics are available, there were 87 chains with 2,352 stores and $127,582,500 sales.

Five of the nine provinces report minor increases in the relative importance of chains in the food retailing field in 1936 compared with 1935. In British Columbia the ratio of chain sales to the total was 37.0 per cent for 1936 compared with 36.2 per cent for 1935. Corresponding chain ratios for other provinces for 1936 with the 1935 figures in brackets are as follows: Ontario, 36.9 per cent (36.1 per cent); Saskatchewan, 33.2 per cent (33.0 per cent); Alberta, 29.9 per cent (29.0 per cent); Manitoba, 28.3 per cent (29.1 per cent); Nova Scotia, 21.7 per cent (22.8 per cent); Quebec, 17.5 per cent (17.5 per cent), and New Brunswick, 14.1 per cent (12.7 per cent).

The comparisons given above for chain and total sales are based on the aggregate business of grocery stores, combination stores and meat markets. There are but a small number of chains of the strictly meat market type and these are only moderate in size. When all straight meat markets are excluded from the calculations and grocery and combination stores only are considered, the ratio of chain to total sales stands at 33.0 per cent for 1936 compared with 32.5 per cent for 1935, 33.3 per cent for 1933 and 29.5 per cent for 1930.

A chain is taken to mean a group of four or more stores under the same ownership and management and carrying on the same or similar kinds of business. Two- or three-store multiples are considered as independents. Nor are voluntary chains included in the regular chain store figures. In addition to the 89 corporate food chains in Canada in 1936 there were also 32 voluntary groups with 6,670 individual members and, while their total annual sales is not known, their purchases from affiliated grocery wholesalers on a co-operative basis amounted to $27,336,200. In the preceding year, 30 of these voluntary groups were reported and these had 6,525 members whose purchases from affiliated wholesalers totalled $27,703,200.

The 89 food chains operating in 1936 and covered by this report include 34 grocery chains with 524 stores and $18,922,900 sales, 41 combination store chains with 1,648 stores and $88,423,000 sales and 14 meat market chains with 162 stores and $4,166,000 sales. Not all units of the combination store chains are of the combination (grocery and meat) type although the tendency in this direction continues.

The seven largest combination store chains in 1935 had 1,350 stores and $71,494,700 sales. Of the total number of stores, 709 or 52.5 per cent were grocery and 641 or 47.5 per cent were of the combination type. Grocery units accounted for 39.9 per cent of the total sales and combination, 60.1 per cent. In 1936 the same chains operated 1,351 stores of which 631 or 46.7 per cent were grocery and 720 or 53.3 per cent were combination. Total sales for these units amounted to $75,483,600, of which grocery stores accounted for 31.8 per cent and combination units for 68.2 per cent.

Employment was furnished to 13,328 persons in food store chains in 1936, of whom 11,507 were male and 1,821 were female and to whom $8,441,900 was paid in salaries and wages. These figures relate to all store employees, part-time and full-time, but warehouse and other overhead staff are not included. The payroll for 1936 was 4.3 per

cent greater than the $8,094,500 paid out in 1935. Sales during the same interval increased by 5.6 per cent.

Stocks on hand in the food chain unit stores was valued at $6,474,300 at the end of 1936. In addition, warehouse stocks were valued at $4,534,000. Credit is still of small proportions in the food chain field. Customers' accounts outstanding at the end of 1936 amounted to $1,252,300, about one per cent of the annual sales.

The increase in food chain sales in 1936 over the preceding year was about the same in the larger cities as in the smaller centres. Of the 2,334 units of food chains in Canada in 1936, 1,355 were located in places of 30,000 population or more and 979 were in smaller places. Food chain sales in the larger cities were up 5.6 per cent in 1936 over the previous year while in the smaller places the increase was 5.5 per cent. Gains in food chain sales in 1936 over 1935 for some of the larger cities are as follows: London, 28 per cent; Edmonton, 25 per cent; Vancouver, 8 per cent; Ottawa, 8 per cent; Toronto, 7 per cent; Winnipeg, 4 per cent, and Montreal, 2 per cent. Since total annual sales for all stores in these cities are not known, it is impossible to tell whether the chains increased their business to a greater extent than did the independent merchant. Included with the chains are the sales of all groups of four stores or over. In the case of border-line cases, such as three-store multiples or chains with four or five units, a slight change in the number of units operated between consecutive years may mean the transfer of the entire company to or from the chain store category. This factor should be kept in mind in interpreting the percentage change in chain sales from year to year.

Gross margin formed 16.37 per cent of sales for grocery chains in 1936 compared with 15.98 per cent in 1935. When classified according to size, gross margin ratio is lower at 14.84 per cent for a group of 11 chains each with fewer than 6 stores compared with 15.47 per cent for an intermediate size group and 16.74 per cent for 13 chains each with more than 10 units.

Gross margin for combination chains formed 20.50 per cent of sales in 1936 compared with 19.99 per cent in 1935,and varied in 1936 from approximately 18 per cent for all chains with fewer than 50 units to 20.85 per cent for 6 companies with more than that number of individual stores.

Meat market chains operated on a gross margin of 22.92 per cent of sales in 1936 compared with 23.58 per cent in 1935.

Table 1.--Summary of Food Chain Stores in Canada, 1936

	Total Food Chains	Grocery Store Chains	Combination Store Chains	Meat Market Chains
Number of chains	89	34	41	14
Number of stores, average(1)	2,229	500	1,579	150
Number of stores, maximum	2,334	524	1,648	162
Net sales, 1936: Store sales	$111,511,900	$18,922,900	$88,423,000	$4,166,000
Total sales(2)	$112,257,300	$19,223,400	$88,867,900	$4,166,000
Stocks on hand, end of year, at cost --				
In retail stores	$ 6,474,300	$ 1,435,600	$ 4,960,300	$ 78,400
In warehouses	$ 4,534,000	$ 765,600	$ 3,760,500	$ 7,900
Gross margin: Amount	$ 22,319,400	$ 3,146,700	$18,218,200	$ 954,700
Per cent of total sales	19.88	16.37	20.50	22.92
Average number of store employees (includes full-time and part-time) --				
Male	11,507	1,391	9,544	572
Female	1,821	623	1,165	33
Salaries and wages	$ 8,441,900	$ 1,273,100	$ 6,707,700	$ 461,100
Total accounts outstanding on December 31: Amount	$ 1,252,300	$ 260,600	$ 846,300	$ 145,400
Per cent of total sales	1.1	1.4	1.0	3.5

(1) Derived from number of units at beginning, middle and end of year.
(2) Includes any sales at wholesale prices direct from warehouses.

Table 2.--Kinds of Stores Operated by Combination Store Chains in 1936

Size of Chain	Number of Chains	Total Units(1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
			$		$		$
All Combination Store Chains, Total	41	1,648	88,423,000	715	26,053,600	916	61,925,300
Chains having --							
Less than 10 units	30	169	8,550,200	25	540,000	136	7,750,200
10 - 99 units	6	128	4,389,200	59	1,478,800	60	2,726,300
100 units and over	5	1,351	75,483,600	631	24,034,800	720	51,448,800

(1) These figures include a few stores other than grocery and combination stores.

Table 3.--Principal Statistics of Food Chains by Provinces, 1930 and 1933 - 1936
(Grocery, Combination and Meat Market Chains Combined)

	1930	1933	1934	1935	1936
CANADA, Total(1) --					
Number of chains	87	91	86	86	89
No. of stores (maximum)	2,352	2,398	2,395	2,309	2,334
Net chain sales, amount	$127,582,500	$103,636,500	$104,912,800	$105,635,900	$111,511,900
Index, 1930 = 100 ...	100.00	81.23	82.23	82.80	87.40
Total sales	$488,429,600	$347,397,000	$363,056,000	$370,909,000	$385,840,000
%, chains to total	26.1	29.8	28.9	28.5	28.9
British Columbia --					
Number of chains	19	17	18	17	16
No. of stores (maximum)	244	282	305	295	298
Net chain sales, amount	$ 10,117,100	$ 8,862,400	$ 9,165,300	$ 10,069,200	$ 10,699,600
Index, 1930 = 100 ...	100.00	87.60	90.59	99.53	105.76
Total sales	$ 37,196,100	$ 24,455,000	$ 25,737,000	$ 27,788,000	$ 28,890,000
%, chains to total	27.2	36.2	35.6	36.2	37.0
Alberta --					
Number of chains	8	11	10	11	10
No. of stores (maximum)	120	127	128	130	131
Net chain sales, amount	$ 5,587,000	$ 4,519,100	$ 4,777,300	$ 5,250,900	$ 5,585,200
Index, 1930 = 100 ...	100.00	80.89	85.51	93.98	99.97
Total sales	$ 23,469,400	$ 15,970,000	$ 17,143,000	$ 18,096,000	$ 18,655,000
%, chains to total	23.8	28.3	27.9	29.0	29.9
Saskatchewan --					
Number of chains	10	8	6	6	5
No. of stores (maximum)	165	138	133	131	125
Net chain sales, amount	$ 6,969,300	$ 4,177,600	$ 4,168,600	$ 4,558,500	$ 4,767,300
Index, 1930 = 100 ...	100.00	59.94	59.81	65.41	68.40
Total sales	$ 21,690,500	$ 13,109,000	$ 13,369,000	$ 13,808,000	$ 14,373,000
%, chains to total	32.1	31.9	31.2	33.0	33.2
Manitoba --					
Number of chains	8	6	5	5	4
No. of stores (maximum)	121	110	109	106	104
Net chain sales, amount	$ 5,689,100	$ 4,697,600	$ 4,895,200	$ 4,813,800	$ 4,908,600
Index, 1930 = 100 ...	100.00	82.57	86.04	84.61	86.28
Total sales	$ 22,225,200	$ 15,480,000	$ 16,016,000	$ 16,555,000	$ 17,372,000
%, chains to total	25.6	30.3	30.6	29.1	28.3
Ontario --					
Number of chains	37	37	36	37	42
No. of stores (maximum)	1,107	1,113	1,086	1,075	1,095
Net chain sales, amount	$ 70,769,300	$ 55,450,700	$ 56,563,500	$ 56,515,600	$ 60,149,700
Index, 1930 = 100 ...	100.00	78.35	79.93	79.86	84.99
Total sales	$206,749,300	$146,528,000	$154,842,000	$156,730,000	$163,219,000
%, chains to total	34.2	37.8	36.5	36.1	36.9
Quebec --					
Number of chains	13	12	12	11	10
No. of stores (maximum)	495	472	483	425	428
Net chain sales, amount	$ 23,708,400	$ 20,456,500	$ 19,759,700	$ 18,809,400	$ 19,595,300
Index, 1930 = 100 ...	100.00	86.28	83.34	79.34	82.65
Total sales	$140,527,500	$104,204,000	$106,708,000	$107,634,000	$111,831,000
%, chains to total	16.9	19.6	18.5	17.5	17.5
New Brunswick --					
Number of chains	5	5	6	5	6
No. of stores (maximum)	30	41	43	36	39
Net chain sales, amount	$ 1,267,300	$ 1,519,900	$ 1,441,000	$ 1,308,400	$ 1,498,900
Index, 1930 = 100 ...	100.00	119.93	113.71	103.24	118.28
Total sales	$ 13,117,200	$ 9,638,000	$ 10,014,000	$ 10,301,000	$ 10,608,000
%, chains to total	9.7	15.8	14.4	12.7	14.1
Nova Scotia --					
Number of chains	9	14	12	13	13
No. of stores (maximum)	66	113	105	108	111
Net chain sales, amount	$ 3,189,100	$ 3,844,700	$ 3,954,700	$ 4,120,900	$ 4,091,200
Index, 1930 = 100 ...	100.00	120.56	124.01	129.22	128.29
Total sales	$ 21,248,900	$ 16,313,000	$ 17,372,000	$ 18,075,000	$ 18,874,000
%, chains to total	15.0	23.6	22.8	22.8	21.7

(1) Includes Prince Edward Island, Yukon and Northwest Territories.

Table 4.--Food Chain Stores and Sales by Provinces and Principal Cities, 1935 and 1936

Province and City	Number of Stores		Value of Sales		
	1935	1936	1935	1936	Per Cent of Change
			$	$	
CANADA, Total(1)	2,309	2,334	105,635,900	111,511,900	+ 5.56
Places 30,000 and over, total	1,331	1,355	61,919,500	65,383,300	+ 5.59
Places under 30,000, total	978	979	43,716,400	46,128,600	+ 5.52
British Columbia, Total	295	298	10,069,200	10,699,600	+ 6.26
Places 30,000 and over, total	188	195	6,335,100	6,684,500	+ 5.52
Vancouver	176	183	5,753,600	6,210,200	+ 7.94
Victoria	12	12	581,500	474,300	-18.44
Places under 30,000, total	107	103	3,734,100	4,015,100	+ 7.53
Alberta, Total	130	131	5,250,900	5,585,200	+ 6.37
Places 30,000 and over, total	78	80	3,300,100	3,533,600	+ 7.08
Calgary	54	54	2,328,400	2,319,900	- 0.36
Edmonton	24	26	971,700	1,213,700	+24.90
Places under 30,000, total	52	51	1,950,800	2,051,600	+ 5.17
Saskatchewan, Total	131	125	4,558,500	4,767,300	+ 4.58
Places 30,000 and over, total	34	34	1,567,200	1,706,900	+ 8.91
Regina	21	21	(X)	(X)	(X)
Saskatoon	13	13	(X)	(X)	(X)
Places under 30,000, total	97	91	2,991,300	3,060,400	+ 2.31
Manitoba, Total	106	104	4,813,800	4,908,600	+ 1.97
Winnipeg	81	82	3,541,600	3,694,200	+ 4.31
Places under 30,000, total	25	22	1,272,200	1,214,400	- 4.54
Ontario, Total	1,075	1,095	56,515,600	60,149,700	+ 6.43
Places 30,000 and over, total	593	612	31,281,400	33,632,700	+ 7.52
Brantford	14	14	903,100	946,500	+ 4.81
Hamilton	129	131	4,649,800	5,029,300	+ 8.16
Kitchener	6	6	560,500	583,200	+ 4.05
London	22	27	1,246,800	1,596,400	+28.04
Ottawa	53	53	2,915,500	3,136,300	+ 7.57
Toronto	294	307	17,943,600	19,242,100	+ 7.24
Windsor	75	74	3,062,100	3,098,900	+ 1.20
Places under 30,000, total	482	483	25,234,200	26,517,000	+ 5.08
Quebec, Total	425	428	18,809,400	19,595,300	+ 4.18
Places 30,000 and over, total	305	298	13,853,500	14,164,100	+ 2.24
Montreal	249	243	11,606,700	11,870,700	+ 2.27
Quebec	7	7	(X)	(X)	(X)
Three Rivers	9	9	(X)	(X)	(X)
Verdun	40	39	1,674,100	1,709,000	+ 2.08
Places under 30,000, total	120	130	4,955,900	5,431,200	+ 9.59
New Brunswick and Nova Scotia, Total	144	150	5,429,300	5,590,100	+ 2.96
Places 30,000 and over, total	52	54	2,040,600	1,967,300	- 3.59
Halifax	41	39	1,491,500	1,310,100	-12.16
St. John	11	15	549,100	657,200	+19.69
Places under 30,000, total	92	96	3,388,700	3,622,800	+ 6.91

(1) Includes Prince Edward Island, Yukon and Northwest Territories.

An (X) indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 5.--Gross Margins for Grocery Chains, 1936

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	34	500	18,922,900	100.00	37,846	3,146,700	16.37
Local Chains	23	191	7,790,100	41.17	40,786	1,280,300	15.99
Provincial Chains	11	309	11,132,800	58.83	36,028	1,866,400	16.64

B. Chains Classified According to Number of Stores

			$		$	$	
ALL CHAINS, Total	34	500	18,922,900	100.00	37,846	3,146,700	16.37
Chains having -							
Less than 6 stores	11	46	1,827,200	9.66	39,722	272,900	14.84
6 - 10 stores	10	67	2,836,200	14.99	42,331	444,300	15.47
11 - 40 stores	11	232)	14,259,500	75.35	36,846	2,429,500	16.74
More than 40 stores	2	155)					

C. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	34	500	18,922,900	100.00	37,846	3,146,700	16.37
Chains having sales of -							
Less than $200,000	13	66	1,685,700	8.91	25,541	246,400	14.51
$200,000 - $1,000,000	15	178	5,955,300	31.47	33,457	901,900	14.57
More than $1,000,000	6	256	11,281,900	59.62	44,070	1,998,400	17.63

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.
(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 6.--Gross Margins for Combination Store Chains, 1936

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	41	1,579	88,423,000	100.00	55,999	18,218,200	20.50
Local Chains	19	99	5,626,800	6.36	56,836	1,030,800	18.32
Provincial Chains	15	248	22,697,800	25.67	91,523	4,756,200	20.78
Sectional and National Chains	7	1,232	60,098,400	67.97	48,781	12,431,200	20.60

B. Chains Classified According to Number of Stores

			$		$	$	
ALL CHAINS, Total	41	1,579	88,423,000	100.00	55,999	18,218,200	20.50
Chains having -							
Less than 6 stores	19	78	3,951,700	4.47	50,663	703,700	17.81
6 - 10 stores	13	95	5,239,300	5.93	55,151	954,200	18.21
11 - 50 stores	3	45	1,716,100	1.94	38,136	306,300	17.64
More than 50 stores	6	1,361	77,515,900	87.66	56,955	16,254,000	20.85

C. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	41	1,579	88,423,000	100.00	55,999	18,218,200	20.50
Chains having sales of -							
Less than $200,000	16	74	2,339,300	2.65	31,612	393,300	16.81
$200,000 - $1,000,000	18	137	7,560,000	8.55	55,182	1,387,500	18.30
More than $1,000,000	7	1,368	78,523,700	88.80	57,400	16,437,400	20.82

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.
(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 7.--Gross Margins for Meat Market Chains, 1936

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	Per Cent of Total		Amount	Per Cent of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	14	150	4,166,000	100.00	27,773	954,700	22.92
Local Chains	9	53	1,889,900	45.36	35,658	440,100	23.29
Provincial and Sectional Chains	5	97	2,276,100	54.64	23,465	514,600	22.61

B. Chains Classified According to Total Sales Volume

			$		$	$	
ALL CHAINS, Total	14	150	4,166,000	100.00	27,773	954,700	22.92
Chains having sales of -							
Less than $200,000	8	37	872,100	20.93	23,570	213,800	24.52
$200,000 - $1,000,000	6	113	3,293,900	79.07	29,150	740,900	22.49

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.
(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 8.--Voluntary Food Chains in Canada, 1930 - 1936
(Number of Chains, Stores, Value of Purchases and Average Purchases Per Store)

Year	Number of Chains	Number of Stores	Total Purchases by Members (at Wholesale Prices)	Average Purchases Per Store	Index of Purchases (1930 = 100)
			$	$	
1930	23	4,472	22,720,500	5,081	100.0
1931	26	5,198	23,626,800	4,545	104.0
1932	26	5,790	25,433,100	4,392	111.9
1933	27	6,025	26,725,400	4,436	117.6
1934	23	5,659	26,842,200	4,743	118.1
1935(1)	30	6,525	27,703,200	4,246	121.9
1936	32	6,670	27,336,200	4,098	120.3

(1) Revised figures.

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Vol. 5 No. 11

FOOD CHAINS IN CANADA

CALENDAR YEAR

1937

Published by Authority of the HON. W.D. EULER, M.P.
Minister of Trade and Commerce.

+ + +

OTTAWA

1938

Price 10 cents

ERRATUM

Food Chains in Canada, 1937.

Paragraph 2, Line 3--"In the previous year the same number of companies operated 2,234 stores and had sales of $ 111,511,900."

Should Read

"In the previous year the same number of companies operated 2,334 stores and had sales of $111,511,900."

Published by Authority of the HON. W. D. EULER, M.P.,
Minister of Trade and Commerce.

DOMINION BUREAU OF STATISTICS - CANADA

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Food Chains in Canada, 1937

The term "food chains" for purposes of this report includes only grocery chains, combination store chains and meat market chains, and does not take into account the operations of bakery products chains, candy store chains or other types which might, with a broader view, be included. In addition to the chains dealt with in the present report there were 8 bakery products chains, (not manufacturing bakeries), 10 candy chains and 2 other so called "food" chains operating in Canada in 1937. Information concerning these may be found in a companion report entitled "Retail Chains in Canada, 1937" which provides a summary of the activities of all retail chains during the year, together with comparative figures for previous years, but does not give the details regarding food chains to be found in the present bulletin.

There were 89 food chain store companies, within the meaning of the term as outlined above, operating 2,287 unit stores in Canada in 1937 with total sales of $121,054,800. In the previous year the same number of companies operated 2,234 stores and had sales of $111,511,900. There was, therefore, a year-to-year gain of 8.6 per cent in the dollar volume of sales in spite of a reduction in the number of stores in operation. The index of food chain sales stood at 94.9 in 1937 (on the base 1930 equals 100) compared with 87.4 for 1936. In 1930, the first year for which these statistics are available, there were 87 food chains operating 2,352 unit stores with a sales volume totalling $127,582,500.

The food chains whose activities are shown here include all companies in the grocery, combination store, and meat market fields and operating four or more retail units. Voluntary chains, in which the various stores are individually owned and operated but which are banded together for buying or advertising purposes, are not included with the corporate chains. Summary statistics for voluntary food chains are presented separately in this report.

Food chains stores transacted 29.3 per cent of the total grocery, combination and meat store business in Canada in 1937. From table number 3, which follows, it will be seen that this is an increase from the 26.1 per cent of the total business transacted in 1930 and compares with 28.9 per cent for 1936, 28.5 per cent for 1935 and 29.8 per cent for 1933.

From both the standpoint of number of stores as well as volume of business the chains of the strictly meat market type are of relatively minor importance. When all straight meat markets are excluded from the calculations and grocery and combination stores only are considered the ratio of chain to total sales stands at 33.5 per cent for 1937 compared with 33.0 per cent for 1936, 32.5 per cent for 1935, 33.3 per cent for 1933 and 29.5 per cent for 1930.

The relative importance of chains in the retail food trade increased in most of the nine provinces in 1937 compared with 1936. The Quebec ratio declined from 17.5 per cent to 16.4 per cent. In Ontario the ratio of chain sales to the total was 38.2 per cent for 1937 compared with 36.9 per cent for 1936. Corresponding chain

[illegible]

[illegible]

[illegible]

ratios for other provinces for 1937 with 1936 figures in brackets are as follows: British Columbia, 38.0 per cent (37.0 per cent); Alberta, 30.9 per cent (29.9 per cent); Saskatchewan, 34.2 per cent (33.2 per cent); Manitoba, 29.3 per cent (28.3 per cent); Nova Scotia, 22.1 per cent (21.7 per cent); New Brunswick 12.9 per cent (14.1 per cent). Figures for Prince Edward Island, Yukon and Northwest Territories are not given separately, but are included in the Canada total.

The 89 food chains operating in 1937 and covered by this report include 31 grocery chains operating 498 unit stores with sales of $20,167,700, 44 combination store chains operating 1,627 unit stores with sales of $96,222,000 and 14 meat market chains operating 162 unit stores with sales of $4,665,100.

Not all units of combination store chains are of the combination type selling both groceries and meats but the proportion of the total number which are of this type continues to grow. Of the 1,627 units of combination store chains operating in 1937, 968 or 59.5 per cent were combination units and these transacted 75.4 per cent of the total business. In 1936, 55.6 per cent of the stores were of the combination type and their sales formed 70.0 per cent of the whole.

Of the 44 combination store chains operating in 1937 the bulk of the business was in the hands of 5 large companies, each with 100 or more retail outlets. These operated 1,315 of the 1,627 stores and their sales were $80,348,200 or 83.5 per cent of the total for the group. Of the 1,315 unit stores operated by these large organizations, 569 or 43.3 per cent were grocery units and 744 or 56.7 per cent were of the combination store type in which both groceries and meats were sold. Of the total sales of $80,348,200 obtained by this group, straight grocery units accounted for $20,603,500 or 25.6 per cent while the combination units accounted for $59,650,400 or 74.4 per cent.

Salaries and wages paid in 1937 to both full-time and part-time male and female employees, but exclusive of warehouse and other overhead staff, amounted to $9,138,800 compared with $8,441,900 in 1936. Store employees of grocery store chains were paid $1,360,800, combination store chains $7,281,700 and meat market chains $496,300. In previous years records were kept of the number of employees but as it has been difficult to classify full-time and part-time employees satisfactorily it is felt that the volume of salaries and wages paid may serve as a more accurate basis for year to year comparison. The payroll for 1937 was 9.2 per cent greater than that for 1936.

Stocks on hand in the food chain unit stores were valued at $6,435,000 at the end of 1937 compared with $6,474,300 at the end of 1936. In addition warehouse stocks were valued at $3,679,400 compared with $4,534,000 the previous year. The credit business done by food chains is of small proportions. Customers' accounts outstanding at the end of 1937 amounted to $1,351,900, approximately 1.1 per cent of the annual sales. Accounts of the grocery store chains outstanding at the end of the year amounted to 1.3 per cent of annual sales, combination store chains 1.0 per cent and meat market chains 3.3 per cent.

The sales of the 2,287 units of food chains operating in Canada in 1937 increased by 8.6 per cent over the previous year. The 1,318 units located in centres of population of 30,000 and over showed a sales increase of 7.3 per cent while the 969 units located in centres of less than 30,000 population recorded an increase of 10.4 per cent. Gains in food chain sales in 1937 over 1936 for some of the larger cities were as follows (gains for 1936 over 1935 shown in brackets): Vancouver, 6.8 per cent (7.9 per cent); Victoria, 54.6 (minus 18.4 per cent); Calgary, 6.4 per cent (minus 0.4 per cent); Edmonton 13.9 per cent (24.9 per cent); Winnipeg 13.8 per cent (4.3 per cent); Hamilton 9.3 per cent (8.2 per cent); Ottawa, 8.9 per cent (7.6 per cent); Toronto, 9.9 per cent (7.2 per cent; Montreal, minus 0.9 per cent (2.3 per cent).

Gross margin formed 16.6 per cent of sales for grocery chains in 1937 compared with 16.4 per cent in 1936 and 16.0 per cent in 1935. When chains are classified according to size, the gross margin ratio is lower at 15.2 per cent for the group of 11 chains each with fewer than six stores compared with 16.0 per cent for an intermediate size group and 16.9 per cent for 12 chains each with more than 10 unit stores.

Gross margin for combination chains formed 19.2 per cent of sales in 1937 compared with 20.5 per cent in 1936 and 20.0 per cent in 1935. Meat market chains operated on a gross margin of 22.5 in 1937 compared with 22.9 in 1936 and 23.6 in 1935.

Voluntary Chains

In addition to the 89 corporate food chains in Canada in 1937 there were also 37 voluntary groups with 6,949 individual members, and while their total annual sales is not known, their purchases from affiliated grocery wholesalers on a cooperative basis amounted to $28,417,700 or an average of $4,089 per store. In the preceding year 32 of these voluntary groups were reported and these had 6,670 members whose purchases from affiliated wholesalers totalled $27,336,200 or $4,098 per store.

Table 1.-- Summary of Food Chain Stores in Canada, 1937

	Total Food Chains	Grocery Store Chains	Combination Store Chains	Meat Market Chains
Number of chains	89	31	44	14
Number of stores, average(1)	2,179	482	1,542	155
Number of stores, maximum	2,287	498	1,627	162
Net Sales:				
Store sales	$121,054,800	$20,167,700	$96,222,000	$4,665,100
Total sales(2)	$122,027,100	$20,621,600	$96,739,800	$4,665,700
Stocks on hand, end of year, at cost				
In retail stores	$ 6,435,000	$ 1,422,800	$ 4,922,600	$ 89,600
In warehouses	$ 3,679,400	$ 735,600	$ 2,926,000	$ 17,800
Gross margin:				
Amount	$ 23,060,200	$ 3,428,200	$18,584,300	$1,047,700
Percent of total sales .	18.9	16.6	19.2	22.5
Salaries and wages	$ 9,138,800	$ 1,360,800	$ 7,281,700	$ 496,300
Total accounts outstanding, Dec. 31				
Amount	$ 1,351,900	$ 274,100	$,923,900	$ 153,900
Percent of total sales .	1.1	1.3	1.0	3.3

(1) Derived from number of units at beginning, middle and end of year.
(2) Includes any sales at wholesale prices direct from warehouses.

Table 2.-- Kinds of Stores Operated by Combination Store Chains in 1936 and 1937

Size of Chain	Number of Chains	Total Units (1)		Grocery Units		Combination Units	
		Number	Sales $	Number	Sales $	Number	Sales $
1936							
All Combination Store Chains, Total	41	1,648	88,423,000	715	26,053,600	916	61,925,300
Chains having --							
Less than 10 units ..	30	169	8,550,200	25	540,000	136	7,750,200
10 - 99 units	6	128	4,389,200	59	1,478,800	60	2,726,300
100 units and over	5	1,351	75,483,600	631	24,034,800	720	51,448,800
1937							
All Combination Store Chains, Total	44	1,627	96,222,000	642	23,321,800	968	72,529,600
Chains having --							
Less than 10 units ..	33	189	11,608,500	35	1,595,500	149	9,920,200
10 - 99 units	6	123	4,265,300	38	1,122,800	75	2,959,000
100 units and over ..	5	1,315	80,348,200	569	20,603,500	744	59,650,400

(1) These figures include a few stores other than grocery and combination stores.

Table 3.-- Principal Statistics of Food Chains by Provinces, 1930, 1933 and 1935-1937

(Grocery, Combination and Meat Market Chains Combined)

	1930	1933	1935	1936	1937
CANADA, Total(1) --					
Number of chains	87	91	86	89	89
No. of stores (maximum)	2,352	2,398	2,309	2,334	2,287
Net chain sales, amount	$127,582,500	$103,638,500	$105,635,900	$111,511,900	$121,054,800
Index, 1930 = 100 ...	100.00	81.23	82.80	87.40	94.88
Total sales	$488,429,600	$347,397,000	$370,909,000	$385,840,000	$412,617,000
%, chains to total	26.1	29.8	28.5	28.9	29.3
British Columbia --					
Number of chains	19	17	17	16	15
No. of stores (maximum)	244	282	295	298	292
Net chain sales, amount	$ 10,117,100	$ 8,862,400	$ 10,069,200	$ 10,699,600	$ 11,888,200
Index, 1930 = 100 ...	100.00	87.60	99.53	105.76	117.51
Total sales	$ 37,196,100	$ 24,455,000	$ 27,788,000	$ 28,890,000	$ 31,308,000
%, chains to total	27.2	36.2	36.2	37.0	38.0
Alberta --					
Number of chains	8	11	11	10	9
No. of stores (maximum)	120	127	130	131	128
Net chain sales, amount	$ 5,587,000	$ 4,519,100	$ 5,250,900	$ 5,585,200	$ 6,200,700
Index, 1930 = 100 ...	100.00	80.89	93.98	99.97	110.98
Total sales	$ 23,469,400	$ 15,970,000	$ 18,096,000	$ 18,655,000	$ 20,089,000
%, chains to total	23.8	28.3	29.0	29.9	30.9
Saskatchewan --					
Number of chains	10	8	6	5	5
No. of stores (maximum)	165	138	131	125	127
Net chain sales, amount	$ 6,969,300	$ 4,177,600	$ 4,558,500	$ 4,767,300	$ 5,135,900
Index, 1930 = 100 ...	100.00	59.94	65.41	68.40	73.69
Total sales	$ 21,690,500	$ 13,109,000	$ 13,808,000	$ 14,373,000	$ 15,006,000
% chains to total	32.1	31.9	33.0	33.2	34.2
Manitoba --					
Number of chains	8	6	5	4	5
No. of stores (maximum)	121	110	106	104	111
Net chain sales, amount	$ 5,689,100	$ 4,697,600	$ 4,813,800	$ 4,908,600	$ 5,414,300
Index, 1930 = 100 ...	100.00	82.57	84.61	86.28	95.17
Total sales	$ 22,225,200	$ 15,480,000	$ 16,555,000	$ 17,372,000	$ 18,480,000
%, chains to total	25.6	30.3	29.1	28.3	29.3
Ontario --					
Number of chains	37	37	37	42	45
No. of stores (maximum)	1,107	1,113	1,075	1,095	1,101
Net chain sales, amount	$ 70,769,300	$ 55,450,700	$ 56,515,600	$ 60,149,700	$ 66,561,000
Index, 1930 = 100 ...	100.00	78.35	79.86	84.99	94.05
Total sales	$206,749,300	$146,528,000	$156,730,000	$163,219,000	$174,393,000
%, chains to total	34.2	37.8	36.1	36.9	38.2
Quebec --					
Number of chains	13	12	11	10	9
No. of stores (maximum)	495	472	425	428	389
Net chain sales, amount	$ 23,708,400	$ 20,456,500	$ 18,809,400	$ 19,595,300	$ 19,602,500
Index, 1930 = 100 ...	100.00	86.28	79.34	82.65	82.68
Total sales	$140,527,500	$104,204,000	$107,634,000	$111,831,000	$119,267,000
%, chains to total	16.9	19.6	17.5	17.5	16.4
New Brunswick --					
Number of chains	5	5	5	6	5
No. of stores (maximum)	30	41	36	39	36
Net chain sales, amount	$ 1,267,300	$ 1,519,900	$ 1,308,400	$ 1,498,900	$ 1,480,800
Index, 1930 = 100 ...	100.00	119.93	103.24	118.28	116.85
Total sales	$ 13,117,200	$ 9,638,000	$ 10,301,000	$ 10,608,000	$ 11,461,000
%, chains to total	9.7	15.8	12.7	14.1	12.9
Nova Scotia --					
Number of chains	9	14	13	13	13
No. of stores (maximum)	66	113	108	111	100
Net chain sales, amount	$ 3,189,100	$ 3,844,700	$ 4,120,900	$ 4,091,200	$ 4,535,800
Index, 1930 = 100 ...	100.00	120.56	129.22	128.29	142.23
Total sales	$ 21,248,900	$ 16,313,000	$ 18,075,000	$ 18,874,000	$ 20,490,000
%, chains to total	15.0	23.6	22.8	21.7	22.1

(1) Includes Prince Edward Island, Yukon and Northwest Territories.

Table 4.-- Food Chain Stores and Sales by Provinces and Principal Cities, 1936 and 1937

Province and City	Number of Stores 1936	Number of Stores 1937	Value of Sales 1936 $	Value of Sales 1937 $	Per Cent of Change
CANADA, Total(1)	2,334	2,287	111,511,900	121,054,800	+ 8.6
Places 30,000 and over, total	1,355	1,318	65,383,300	70,130,500	+ 7.3
Places under 30,000, total	979	969	46,128,600	50,924,300	+ 10.4
British Columbia, Total	298	292	10,699,600	11,888,200	+ 11.1
Places 30,000 and over, total	195	188	6,684,500	7,365,100	+ 10.2
Vancouver	183	176	6,210,200	6,631,700	+ 6.8
Victoria	12	12	474,300	733,400	+ 54.6
Places under 30,000, total	103	104	4,015,100	4,523,100	+ 12.7
Alberta, Total	131	128	5,585,200	6,200,700	+ 11.0
Places 30,000 and over, total	80	80	3,533,600	3,850,400	+ 9.0
Calgary	54	54	2,319,900	2,468,600	+ 6.4
Edmonton	26	26	1,213,700	1,381,800	+ 13.9
Places under 30,000, total	51	48	2,051,600	2,350,300	+ 14.6
Saskatchewan, Total	125	127	4,767,300	5,135,900	+ 7.7
Places 30,000 and over, total	34	37	1,706,900	1,931,600	+ 13.2
Regina	21	22	(X)	(X)	(X)
Saskatoon	13	15	(X)	(X)	(X)
Places under 30,000, total	91	90	3,060,400	3,204,300	+ 4.7
Manitoba, Total	104	111	4,908,600	5,414,300	+ 10.3
Places 30,000 and over, total					
Winnipeg(2)	82	92	3,694,200	4,202,200	+ 13.8
Places under 30,000, total	22	19	1,214,400	1,212,100	- 0.2
Ontario, Total	1,095	1,101	60,149,700	66,561,000	+ 10.7
Places 30,000 and over, total	612	600	33,632,700	36,472,000	+ 8.4
Brantford	14	13	946,500	991,500	+ 4.8
Hamilton	131	127	5,029,300	5,496,400	+ 9.3
Kitchener	6	6	583,200	655,900	+ 12.5
London	27	27	1,596,400	1,807,400	+ 13.2
Ottawa	53	51	3,136,300	3,415,100	+ 8.9
Toronto(3)	307	305	19,242,100	21,145,600	+ 9.9
Windsor	74	71	3,098,900	2,960,100	- 4.5
Places under 30,000, total	483	501	26,517,000	30,089,000	+ 13.5
Quebec, Total	428	389	19,595,300	19,602,500	+ 0.0
Places 30,000 and over, total	298	271	14,164,100	14,106,900	- 0.4
Montreal(4)	243	220	11,870,700	11,761,300	- 0.9
Quebec	7	7	(X)	(X)	(X)
Three Rivers	9	8	(X)	(X)	(X)
Verdun	39	36	1,709,000	1,717,300	+ 0.5
Places under 30,000, total	130	118	5,431,200	5,495,600	+ 1.2
New Brunswick and Nova Scotia, Total	150	136	5,590,100	6,016,600	+ 7.7
Places 30,000 and over, total	54	50	1,967,300	2,202,300	+ 12.0
Halifax	39	37	1,310,100	1,595,000	+ 21.8
St. John	15	13	657,200	607,300	- 7.6
Places under 30,000, total	96	86	3,622,800	3,814,300	+ 5.3

(1) Includes Prince Edward Island, Yukon & Northwest Territories. (2) Includes suburbs. (3) Toronto proper only. (4) Montreal proper only. (X) indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 5.-- Gross Margins for Grocery Chains, 1937

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	% of Total		Amount	% of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	31	482	20,167,700	100.0	41,842	3,428,200	16.6
Local Chains	20	175	8,911,900	44.2	50,925	1,583,100	16.9
Provincial Chains	11	307	11,255,800	55.8	36,664	1,845,100	16.4

B. Chains Classified According to Number of Stores

			$		$	$	
ALL CHAINS, Total	31	482	20,167,700	100.0	41,842	3,428,200	16.6
Chains having --							
Less than 6 stores	11	47	2,023,400	10.0	43,051	315,800	15.2
6 - 10 stores	8	54	2,588,400	12.8	47,933	418,800	16.0
11 - 40 Stores	10	224)	15,555,900	77.1	40,829	2,693,600	16.9
More than 40 stores	2	157)					

C. Chains Classified According to Total Retail Sales Volume

			$		$	$	
ALL CHAINS, Total	31	482	20,167,700	100.0	41,842	3,428,200	16.6
Chains having sales of --							
Less than $200,000	11	53	1,471,800	7.3	27,770	233,500	15.2
$200,000 - $1,000,000	14	169	6,178,400	30.6	36,559	1,069,900	16.7
More than $1,000,000	6	260	12,517,500	62.1	48,144	2,124,800	16.8

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.

(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouse.

Table 6.-- Gross Margins for Combination Store Chains, 1937

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	% of Total		Amount	% of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	44	1,542	96,222,000	100.0	62,401	18,584,300	19.2
Local Chains	20	110	7,456,500	7.8	67,786	1,253,900	16.6
Provincial Chains	16	250	26,682,000	27.7	106,728	5,273,500	19.6
Sectional Chains	6	448)	62,083,500	64.5	52,524	12,056,900	19.4
National Chains	2	734)					

B. Chains Classified According to Number of Stores

			$		$	$	
ALL CHAINS, Total	44	1,542	96,222,000	100.0	62,401	18,584,300	19.2
Chains having --							
Less than 6 stores	20	81	5,730,900	6.0	70,752	957,800	16.4
6 - 10 stores	15	112	6,467,100	6.7	57,742	1,126,700	17.4
11 - 50 stores	3	41	1,687,500	1.8	41,159	300,900	17.8
More than 50 stores	6	1,308	82,336,500	85.6	62,948	16,198,900	19.6

C. Chains Classified According to Total Retail Sales Volume

			$		$	$	
ALL CHAINS, Total	44	1,542	96,222,000	100.0	62,401	18,584,300	19.2
Chains having sales of --							
Less than $200,000	12	53	1,728,000	1.8	32,604	285,200	15.6
$200,000 - $1,000,000	24	169	10,030,300	10.4	59,351	1,766,600	17.6
More than $1,000,000	8	1,320	84,463,700	87.8	63,988	16,532,500	19.5

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.
(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 7.-- Gross Margins for Meat Market Chains, 1937

A. Chains Classified According to Type of Operation

	Number of Chains	Average Number of Stores(1)	Store Sales		Average Sales Per Store	Gross Margin	
			Amount	% of Total		Amount	% of Total Sales(2)
			$		$	$	
ALL CHAINS, Total	14	155	4,665,100	100.0	30,097	1,047,700	22.5
Local Chains	10	59	2,298,400	49.3	38,956	520,400	22.6
Provincial Chains	2	14)	2,366,700	50.7	24,653	527,300	22.3
Sectional Chains	2	82)					

B. Chains Classified According to Total Retail Sales Volume

			$		$	$	
ALL CHAINS, Total	14	155	4,665,100	100.0	30,097	1,047,700	22.5
Chains having sales of --							
Less than $200,000	8	38	992,900	21.3	26,129	232,600	23.4
$200,000 - $1,000,000	6	117	3,672,200	78.7	31,386	815,100	22.2

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.
(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 8.-- Voluntary Food Chains in Canada, 1930 - 1937

(Number of Chains, Stores, Value of Purchases and Average Purchases Per Store)

Year	Number of Chains	Number of Stores	Total Purchases by Members (at Wholesale Prices)	Average Purchases Per Store	Index of Purchases (1930 = 100)
			$	$	
1930	23	4,472	22,720,500	5,081	100.0
1931	26	5,198	23,626,800	4,545	104.0
1932	26	5,790	25,433,100	4,392	111.9
1933	27	6,025	26,725,400	4,436	117.6
1934	23	5,659	26,842,200	4,743	118.1
1935(1)	30	6,525	27,703,200	4,246	121.9
1936	32	6,670	27,336,200	4,098	120.3
1937	37	6,949	28,417,700	4,089	125.1

(1) Revised figures.

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA

CALENDAR YEAR

1938

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Published by Authority of the HON. W.D. EULER, M.P.,
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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Food Chains in Canada, 1938

Notwithstanding a reduction in the number of stores in operation, food chains maintained their position in the total food retailing trade last year. There were 91 food chain companies in Canada in 1938, including grocery chains, combination store chains and meat market chains, and these operated 2,212 unit stores with annual sales of $121,371,500 or 29.4 per cent of the total annual turnover of all similar stores including both chains and independents. In 1937 there were 89 chain companies with 2,287 stores whose annual sales totalled $121,054,800 or 29.3 per cent of the total food store business. Ratios of chain sales to total sales for earlier years are 28.9 per cent for 1936, 28.5 per cent for 1935, 28.9 per cent for 1934, 29.8 per cent for 1933, 29.7 per cent for 1932, 29.0 per cent for 1931, and 26.1 per cent for 1930.

Although aggregate food chain sales for the country varied but little in 1938 from the preceding year, results for individual provinces reveal mixed trends of varying proportions. Chain sales in Alberta, Saskatchewan and the Maritime Provinces were maintained close to the 1937 level. There were 14 food chain companies in British Columbia in 1938 and these operated 28.1 unit stores within the province whose annual sales of $11,199,600 were down by 6 per cent from the volume of business transacted by chains in the preceding year. Total sales of all food stores in this province also declined but to a smaller degree with the result that the ratio of chain to total sales declined from 38.0 per cent in 1937 to 36.6 per cent in 1938. Food chains transacted 8 per cent less business in Manitoba in 1938 than in the preceding year while the ratio of chain to total sales declined from 29.3 per cent to 27.2 per cent. Ontario chains secured a greater proportion of the food store business in 1938 than in 1937. In 1938 there were 48 chain companies operating 1,076 stores in this province and these had sales totalling $68,503,400 or 39.5 per cent of the total business of all food stores. In 1937 there were 45 companies with 1,101 stores and $66,561,000 sales, an amount which formed 38.2 per cent of the total sales of all food stores including both chains and independents. Nine chain companies operated 358 stores in Quebec province in 1938 and these had sales of $19,031,600 or 15.8 per cent of the total food store business. In the preceding year a like number of chains operated 389 stores and these transacted 16.4 per cent of the total business.

Figures given in the preceding paragraphs relate to the operations of corporate chains only; that is, groups of four or more units under the same ownership or management and engaged in the retail distribution of groceries, meats or meats and groceries together. Voluntary chains are not included. While information regarding the annual turnover of voluntary chains is not available, statistics furnished by the affiliated wholesale firms give some indication of the development in this type of merchandising. There were 39 voluntary chains in the food retailing field in Canada last year and these were comprised of 7,158 individual stores whose annual purchases from affiliated wholesalers at wholesale prices totalled $29,435,200 or an average of $4,112 per store. In 1937 there were 37 voluntary chain groups with 6,949 members whose annual purchases at wholesale prices from affiliated wholesalers amounted to $28,417,700 or an average of $4,089 per store. Thus it is apparent that the number of stores retailing food products and belonging to voluntary chains greatly exceeds the number of corporate chain units. The relatively small figure of $4,112 for average purchases per store for voluntary chains may require a word of explanation.

Many of these voluntary chains include a great number of country general stores whose affiliation in the group is restricted to their grocery departments. Purchases of other than food products are normally made from wholesalers not connected with the voluntary chain. It should also be noted that there is great variation in the degree to which members of voluntary chains restrict their purchases of food products to the affiliated wholesale houses. For these reasons the figure of $4,112 cannot be taken to give any indication of the average annual turnover of stores in these voluntary chains.

A significant development in chain store operation in the food retailing field during recent years is the shift towards larger stores, the proportion of total food chain business transacted by stores with annual sales of $100,000 or more almost doubling since 1934. In that year there were 152 chain units with annual sales of $100,000 or more and these transacted 21.7 per cent of the annual food chain business. In 1935 there were 164 stores in this category and these transacted 23.9 per cent of the total chain business; in 1936 there were 180 large stores with 26.3 per cent of the sales; in 1937 there were 225 stores with 32.7 per cent of the total business, while 1938 witnessed a continuation of the same trend. In that year there were 263 stores each with annual sales of $100,000 or more and these accounted for 39.1 per cent of the total food chain business. This transition has naturally been accompanied by a reduction in the proportion of the total business transacted by the smaller stores. Stores with annual sales of between $20,000 and $100,000 transacted 71.3 per cent of the total food chain business in 1934; in 1938 the proportion for the same range had declined to 56.3 per cent. Nevertheless, a considerable number of relatively small chain units are still in operation. There were 445 chain units in operation in 1938, each with annual sales of less than $20,000. But included in this were a considerable number of stores which were opened in the year under review and which had less than a twelve-month period on which to report.

Food chains analyzed in this report are divided into three main types: grocery chains, combination store chains (selling both groceries and meats) and meat market chains. There were 31 grocery chains in Canada in 1938 and these operated 484 stores and had $19,655,500 sales. There were 46 combination store chains with 1,570 unit stores and $97,194,300 sales and 14 meat market chains with 158 stores and $4,521,700 sales.

The 46 combination store chains were not comprised exclusively of stores of the combination type. These chains operated 635 units of the purely grocery type in addition to 927 units in which both groceries and meats were sold. They also operated 8 units engaged almost exclusively in the sale of meat products.

Salaries and wages paid to store employees engaged in food chains were reported at $9,080,800 for 1938, down slightly from the $9,138,800 reported for 1937. Stocks on hand in the retail outlets were valued at $6,238,100 at the close of 1938 while warehouse stocks were valued at another $3,349,000 making a total inventory of $9,587,100. Total stocks at the end of the preceding year were valued at $10,114,400.

Customers' accounts outstanding were valued at $1,601,400 at the end of 1938, up slightly from the $1,351,900 reported at the end of 1937 but forming only 1.3 per cent of the annual sales.

Table 1.--Summary of Food Chain Stores in Canada, 1938

	Total Food Chains	Grocery Store Chains	Combination Store Chains	Meat Market Chains
Number of chains	91	31	46	14
Number of stores, average (1)	2,093	460	1,478	155
Number of stores, maximum	2,212	484	1,570	158
Net Sales:				
Store sales	$121,371,500	$19,655,500	$97,194,300	$4,521,700
Total sales (2)	$123,230,300	$20,901,000	$97,807,600	$4,521,700
Stocks on hand, end of year, at cost:				
In retail stores	$ 6,238,100	$ 1,300,900	$ 4,828,400	$ 108,800
In warehouses	$ 3,349,000	$ 592,000	$ 2,752,700	$ 4,300
Salaries and wages	$ 9,080,800	$ 1,322,600	$ 7,261,500	$ 496,700
Total accounts outstanding, Dec. 31:				
Amount	$ 1,601,400	$ 345,400	$ 1,107,500	$ 148,500
Per cent of total sales ..	1.3	1.7	1.1	3.3

(1) Derived from number of units at beginning, middle and end of year.
(2) Includes any sales at wholesale prices direct from warehouses.

Table 2.--Kinds of Stores Operated by Combination Store Chains in 1937 and 1938.

Size of Chain	Number of Chains	Total Units (1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
			$		$		$
1 9 3 7							
All Combination Store Chains, Total	44	1,627	96,222,000	642	23,321,800	968	72,529,600
Chains having --							
Less than 10 units .	33	189	11,608,500	35	1,595,500	149	9,920,200
10 - 99 units	6	123	4,265,300	38	1,122,800	75	2,959,000
100 units and over .	5	1,315	80,348,200	569	20,603,500	744	59,650,400
1 9 3 8							
All Combination Store Chains, Total	48	1,570	97,194,300	635	22,192,200	927	74,775,200
Chains having --							
Less than 10 units .	34	194	12,668,100	42	1,963,700	146	10,575,700
10-- 99 units	7	136	5,196,300	56	1,513,800	79	3,678,300
100 units and over .	5	1,240	79,329,900	537	18,714,700	702	60,521,200

(1) These figures include a few stores other than grocery and combination stores.

Table 3.--Principal Statistics of Food Chains by Provinces, 1930, 1933 and 1936-1938.

(Grocery, Combination and Meat Market Chains Combined)

	1930	1933	1936	1937	1938
CANADA, Total(1)--					
Number of chains	87	91	89	89	91
No. of stores (maximum)	2,352	2,398	2,334	2,287	2,212
Net chain sales, amount	$127,582,500	$103,638,500	$111,511,900	$121,054,800	$121,371,500
Index, 1930=100	100.00	81.23	87.40	94.88	95.13
Total sales	$488,429,600	$347,397,000	$385,840,000	$412,617,000	$412,292,000
%, chains to total	26.1	29.8	28.9	29.3	29.4
British Columbia --					
Number of chains	19	17	16	15	14
No. of stores (maximum)	244	282	298	292	281
Net chain sales, amount	$ 10,117,100	$ 8,862,400	$ 10,699,600	$ 11,888,200	$ 11,199,600
Index, 1930=100	100.00	87.60	105.76	117.51	110.70
Total sales	$ 37,196,100	$ 24,455,000	$ 28,890,000	$ 31,308,000	$ 30,575,000
%, chains to total	27.2	36.2	37.0	38.0	36.6
Alberta --					
Number of chains	8	11	10	9	8
No. of stores (maximum)	120	127	131	128	124
Net chain sales, amount	$ 5,587,000	$ 4,519,100	$ 5,585,200	$ 6,200,700	$ 6,296,500
Index, 1930=100	100.00	80.89	99.97	110.98	112.70
Total sales	$ 23,469,400	$ 15,970,000	$ 18,655,000	$ 20,089,000	$ 20,641,000
%, chains to total	23.8	28.3	29.9	30.9	30.5
Saskatchewan --					
Number of chains	10	8	5	5	6
No. of stores (maximum)	165	138	125	127	130
Net chain sales, amount	$ 6,969,300	$ 4,177,600	$ 4,767,300	$ 5,135,900	$ 5,193,700
Index, 1930=100	100.00	59.94	68.40	73.69	74.52
Total sales	$ 21,690,500	$ 13,109,000	$ 14,373,000	$ 15,006,000	$ 15,020,000
%, chains to total	32.1	31.9	33.2	34.2	34.6
Manitoba --					
Number of chains	8	6	4	5	5
No. of stores (maximum)	121	110	104	111	109
Net chain sales, amount	$ 5,689,100	$ 4,697,600	$ 4,908,600	$ 5,414,300	$ 4,974,500
Index, 1930=100	100.00	82.57	86.28	95.17	87.44
Total sales	$ 22,225,200	$ 15,480,000	$ 17,372,000	$ 18,480,000	$ 18,318,000
%, chains to total	25.6	30.3	28.3	29.3	27.2
Ontario --					
Number of chains	37	37	42	45	48
No. of stores (maximum)	1,107	1,113	1,095	1,101	1,076
Net chain sales, amount	$ 70,769,300	$ 55,450,700	$ 60,149,700	$ 66,561,000	$ 68,503,400
Index, 1930=100	100.00	78.35	84.99	94.05	96.80
Total sales	$206,749,300	$146,528,000	$163,219,000	$174,393,000	$173,440,000
%, chains to total	34.2	37.8	36.9	38.2	39.5
Quebec --					
Number of chains	13	12	10	9	9
No. of stores (maximum)	495	472	428	389	358
Net chain sales, amount	$ 23,708,400	$ 20,456,500	$ 19,595,300	$ 19,602,500	$ 19,031,600
Index, 1930=100	100.00	86.28	82.65	82.68	80.27
Total sales	$140,527,500	$104,204,000	$111,831,000	$119,267,000	$120,765,000
%, chains to total	16.9	19.6	17.5	16.4	15.8
New Brunswick --					
Number of chains	5	5	6	5	5
No. of stores (maximum)	30	41	39	36	36
Net chain sales, amount	$ 1,267,300	$ 1,519,900	$ 1,498,900	$ 1,480,800	$ 1,408,100
Index, 1930=100	100.00	119.93	118.28	116.85	111.11
Total sales	$ 13,117,200	$ 9,638,000	$ 10,608,000	$ 11,461,000	$ 11,169,000
%, chains to total	9.7	15.8	14.1	12.9	12.6
Nova Scotia --					
Number of chains	9	14	13	13	12
No. of stores (maximum)	66	113	111	100	95
Net chain sales, amount	$ 3,183,100	$ 3,844,700	$ 4,091,200	$ 4,535,800	$ 4,531,400
Index, 1930=100	100.00	120.56	128.29	142.23	142.09
Total sales	$ 21,248,900	$ 16,313,000	$ 18,874,000	$ 20,490,000	$ 20,303,000
%, chains to total	15.0	23.6	21.7	22.1	22.3

(1) Includes Prince Edward Island, Yukon and Northwest Territories.

Table 4.--Food Chain Stores and Sales by Provinces and Principal Cities, 1937 and 1938

Province and City	Number of Stores		Value of Sales		
	1937	1938	1937	1938	Per Cent of Change
			$	$	
CANADA, Total(1)	2,287	2,212	121,054,800	121,371,500	+ 0.3
Places 30,000 and over, total	1,318	1,234	70,130,500	68,576,000	- 2.2
Places under 30,000, total	969	978	50,924,300	52,795,500	+ 3.7
British Columbia, Total	292	281	11,888,200	11,199,600	- 5.8
Places 30,000 and over, total	188	177	7,365,100	6,861,000	- 6.8
Vancouver	176	164	6,631,700	5,848,900	- 11.8
Victoria	12	13	733,400	1,012,100	+ 38.0
Places under 30,000, total	104	104	4,523,100	4,338,600	- 4.1
Alberta, Total	128	124	6,200,700	6,296,500	+ 1.5
Places 30,000 and over, total	80	76	3,850,400	3,922,400	+ 1.9
Calgary	54	51	2,468,600	2,520,700	+ 2.1
Edmonton	26	25	1,381,800	1,401,700	+ 1.4
Places under 30,000, total	48	48	2,350,300	2,374,100	+ 1.0
Saskatchewan, Total	127	130	5,135,900	5,193,700	+ 1.1
Places 30,000 and over, total	37	42	1,931,600	2,117,900	+ 9.6
Regina	22	27	(X)	(X)	(X)
Saskatoon	15	15	(X)	(X)	(X)
Places under 30,000, total	90	88	3,204,300	3,075,800	- 4.0
Manitoba, Total	111	109	5,414,300	4,974,500	- 8.1
Places 30,000 and over, Total	92	93	4,202,200	(X)	(X)
Winnipeg(2)	92	93	4,202,200	(X)	(X)
Places under 30,000, total	19	16	1,212,100	(X)	(X)
Ontario, Total	1,101	1,076	66,561,000	68,503,400	+ 2.9
Places 30,000 and over, total	600	563	36,472,000	36,311,800	- 0.4
Brantford	13	13	991,500	980,800	- 1.1
Hamilton	127	124	5,496,400	5,609,700	+ 2.1
Kitchener	6	5	655,900	738,400	+ 12.6
London	27	28	1,807,400	1,935,200	+ 7.1
Ottawa	51	50	3,415,100	3,469,200	+ 1.6
Toronto (3)	305	277	21,145,600	20,948,800	- 0.9
Windsor	71	66	2,960,100	2,629,700	- 11.2
Places under 30,000, total	501	513	30,089,000	32,191,600	+ 7.0
Quebec, Total	389	358	19,602,500	19,031,600	- 2.9
Places 30,000 and over, total	271	238	14,106,900	13,275,400	- 5.9
Montreal (4)	220	197	11,761,300	10,878,300	- 7.5
Quebec	7	4	(X)	(X)	(X)
Three Rivers	8	6	(X)	(X)	(X)
Verdun	36	31	1,717,300	1,741,600	+ 1.4
Places under 30,000, total	118	120	5,495,600	5,756,200	+ 4.7
New Brunswick and Nova Scotia, Total	136	131	6,016,600	5,939,500	- 1.3
Places 30,000 and over, Total	50	45	2,202,300	2,137,000	- 3.0
Halifax	37	33	1,595,000	1,554,200	- 2.6
St. John	13	12	607,300	582,800	- 4.0
Places under 30,000, total	86	86	3,814,300	3,802,500	- 0.3

(1) Includes Prince Edward Island, Yukon and Northwest Territories. (2) Includes suburbs. (3) Toronto proper only. (4) Montreal proper only. (X) indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

CHAIN UNITS CLASSIFIED ACCORDING TO AMOUNT OF ANNUAL SALES, BY YEARS

(Grocery, Combination and Meat Markets)

Table 5.

Amount of Annual Sales	1934				1936				1937				1938			
	Number of Stores	Sales			Number of Stores	Sales			Number of Stores	Sales			Number of Stores	Sales		
		Amount	%	Cum. %		Amount	%	Cum. %		Amount	%	Cum. %		Amount	%	Cum. %
$		$				$				$				$		
300,000 - 499,999	1	302,700	0.29	0.29	9	2,925,200	2.62	2.62	14	4,959,800	4.10	4.10	22	7,667,800	6.32	6.32
200,000 - 299,999	24	5,639,700	5.38	5.67	30	7,026,100	6.30	8.92	54	12,874,600	10.64	14.74	62	15,166,200	12.50	18.82
100,000 - 199,999	127	16,843,900	16.06	21.73	141	19,322,700	17.33	26.25	157	21,721,100	17.94	32.68	179	24,618,600	20.28	39.10
50,000 - 99,999	566	38,138,600	36.35	58.08	571	38,441,100	34.47	60.72	612	41,514,500	34.29	66.97	522	35,532,300	29.28	68.38
30,000 - 49,999	594	23,164,600	22.08	80.16	668	26,154,900	23.46	84.18	625	24,408,900	20.16	87.13	580	22,719,100	18.72	87.10
20,000 - 29,999	543	13,529,700	12.90	93.06	478	11,923,800	10.69	94.87	414	10,268,700	8.48	95.61	402	10,013,400	8.25	95.35
10,000 - 19,999	413	6,631,300	6.32	99.38	319	5,027,300	4.51	99.38	289	4,584,000	3.79	99.40	314	4,881,700	4.02	99.37
5,000 - 9,999	69	506,800	0.48	99.86	76	580,900	0.52	99.90	73	570,600	0.47	99.87	82	629,500	0.52	99.89
Less than 5,000	58	155,500	0.14	100.00	42	109,900	0.10	100.00	49	152,600	0.13	100.00	49	142,900	0.11	100.00

Table 6.--Voluntary Food Chains in Canada, 1930 - 1938
(Number of Chains, Stores, Value of Purchases and Average Purchases Per Store)

Year	Number of Chains	Number of Stores	Total Purchases by Members (at Wholesale Prices)	Average Purchases Per Store	Index of Purchases (1930 = 100)
			$	$	
1930	23	4,472	22,720,500	5,081	100.0
1931	26	5,198	23,626,800	4,545	104.0
1932	26	5,790	25,433,100	4,392	111.9
1933	27	6,025	26,725,400	4,436	117.6
1934	23	5,659	26,842,200	4,743	118.1
1935(1)	30	6,525	27,703,200	4,246	121.9
1936	32	6,670	27,336,200	4,098	120.3
1937	37	6,949	28,417,700	4,089	125.1
1938	39	7,158	29,435,200	4,112	129.6

(1) Revised figures.

LIST OF FOOD CHAINS IN CANADA

Grocery Store Chains

Allan's Black and White Stores	10402 - 97th St.,	Edmonton, Alta.
B. and K. Economy Cash Stores, Ltd.	1484 W. Broadway	Vancouver, B. C.
Bassin's Food Stores	405 Jane St.	Toronto, Ont.
Carroll's Limited	19 Hughson St. S.	Hamilton, Ont.
Charbonneau, L. A.	127 Hotel de Ville	Quebec, Que.
Curry's Grocery	6115 Fraser St.	Vancouver, B.C.
The T. Eaton Co., Ltd.(Ontario Groceterias)		Toronto, Ont.
Elliott's Stores Ltd.	5339 West Boulevard	Vancouver, B.C.
Foster's Economy Stores	383 Roncesvalles Ave.	Toronto, Ont.
Gowman, The Grocery	181 Colborne St.	Brantford, Ont.
Gust, The S. E. Stores	626-3rd St.	Medicine Hat, Alta.
Hickman Stores, The	843 Bank St.	Ottawa, Ont.
Jenkins Groceteria Ltd. (Alberta)	702-9th Ave. W.	Calgary, Alta.
Jewel Stores Ltd.	592 Main St.	Winnipeg, Man.
London Grocery and Provision Stores Ltd.	2225 Main St.	Vancouver, B.C.
McBride's Limited	1333 Garnet St.	Regina, Sask.
Model Grocery Ltd.	308-6th St.	New Westminster, B.C.
Neal Brothers Ltd.	283 Stanley St.	Winnipeg, Man.
O. K. Economy Stores	301 Ontario Ave.	Saskatoon, Sask.
Overwaitea Ltd.	1181 Richards St.	Vancouver, B.C,
Quality Groceterias	33 Sanford Ave.	Hamilton, Ont.
Ramsey, E. E.		Petrolia, Ont.
Steinberg's Wholesale Groceterias Ltd.	445 River St.	Verdun, Que.
Sterling Stores Ltd.	605 Barrington St.	Halifax, N. S.
Superior Stores (B.C.) Ltd.	207 West Hastings St.	Vancouver, B.C.
Tait, Harry Groceterias Ltd.	10012-101st. Ave.	Edmonton, Alta.
Thomas Bros.	438 Dundurn St.	Hamilton, Ont.
Thomson Groceries Ltd.	Rear of 302 Greenwood Ave.	Toronto, Ont.
Toronto Grocery Stores	290 Queen St. E.	Toronto, Ont.
United Pure Food Stores Reg'd.	721 Imperial Ave.	Montreal, Que.
Wilbie's Service Stores	6027 Fraser St.	Vancouver, B. C.

Combination Store Chains

Acadia Stores Limited	32 Spring Garden Rd.	Halifax, N. S.
Adam and Co., Ltd.	42 Borgia St.	Sudbury, Ont.
Bailey's Warehouse Food Shops	169 Brisbin St.	London, Ont.
Barker's Grocery	100 Princess St.	Saint John, N.B.
Barker's Stores Ltd.	Provost St.	New Glasgow, N.S.
Boyle, H. J. Co., Ltd.	168-1/2 Charlotte St.	Peterboro, Ont.
Brook's Stores	301 Townsend St.	Sydney, N.S.
Butti, Samuel	268 Ferguson St.	North Bay, Ont.
Buy Right, The Stores Ltd.	521-525 Gottingen St.	Halifax, N. S.
Buywell Food Markets Ltd.	940 Inspector St.	Montreal, Que.
Campbelton's Cash and Carry Stores	Union St.	Campbellton, N. B.
Consumer's Cooperative Society Ltd.	64-4th Ave.	Timmins, Ont.
Cosmopolitan, The Stores	Laurier St.	Sydney, N. S.
Curtis Markets	1028 Pape Ave.	Toronto, Ont.
David's Markets Ltd.	Charlotte St.	Sydney, N.S.
Dominion Stores Limited	3 Sullivan St.	Toronto, Ont.
T. Eaton Co. Ltd. (Maritime Groceterias)		Toronto, Ont.
" " " " (Western Groceterias)		" "
Empire Meat Co., Ltd.	330-2nd Ave. S.	Saskatoon, Sask.
Fitzpatrick and Geraghty Ltd.	196 Rubidge St.	Peterborough, Ont.
Gilmer and Thomson	26 Queen St.	St. Catharines, Ont.
Great A. and P. Tea Co. Ltd., The	135 Laughton Ave.	Toronto, Ont.
International Provisions Co., Ltd.	626 Barrington St.	Halifax, N. S.
Kofman Brothers and Fine	896 Queen St. W.	Toronto, Ont.
Les Epiceries A. Marcil	1120 Mt. Royal Ave.	Montreal, Que.
Loblaw Groceterias Co. Ltd.	Fleet and Bathurst Sts.	Toronto, Ont.
Luckin's Ltd.	4 Parkhurst Blvd.	Toronto, Ont.
M. and P. Stores Ltd.	375 Sandwich St. W.	Windsor, Ont.
McDonald, B.C.	64 Windsor St.	Halifax, N.S.
Mason's Grocery Stores	429 George St.	Peterborough, Ont.
Miracle Marketerias Ltd.	2424 Yonge St.	Toronto, Ont.
Phillips Markets Ltd.	805 Howard Ave.	Windsor, Ont.
Pinch, The J. C. Stores	536 Queen St.	Sault Ste Marie, Ont.
Powell and Co. Ltd.	Cor. King and Main Sts.	Dundas, Ont.

LIST OF FOOD CHAINS IN CANADA--(Cont'd)

Combination Store Chains--Cont'd.

Power Food, The Markets	118 King St. E.	Toronto, Ont.
Progressive Trading Cooperative Ltd.	638 Queen St. W.	" "
Ray's Limited	1105 Dominion Bldg.	Vancouver, B.C.
Safeway's Ltd.	313 Pacific Ave.	Winnipeg, Man.
Shop-Easy Stores Limited	312 Confederation Life Bldg.	Winnipeg, Man.
Shoprite Stores	1502-12th Ave. W.	Calgary, Alta.
Sobey, J. W.		Stellarton, N.S.
Sosowsky and Slabodsky, Messrs.	546 Simpson St.	Fort William, Ont.
Thrift Stores Limited	960 Outremont Ave.	Montreal, Que.
Wetmore, G. R.	79 Ludlow St.	St. John, N.B.
Whyte Packing Company, The Ltd.	Linton Ave.	Stratford, Ont.
Worker's Cooperative of New Ontario Ltd.	64-3rd. Ave.	Timmins, Ont.

Meat Market Chains

Brooker's Meat Market	Talbot St. E.	Leamington, Ont.
Buehler Bros. Limited	2896 Dundas St. W.	Toronto, Ont.
Burns and Co., Ltd.		Calgary, Alta.
Calvert, Willis	1232 Dundas St. W.	Toronto, Ont.
Collins, Len	475 Danforth Ave.	Toronto, Ont.
Cooper, Joseph Ltd.	466 Queen St. W.	Toronto, Ont.
Cross Stores	1310-1312 Douglas St.	Victoria, B.C.
Duff's Meat Stores and Master Meat Meat Markets Co. of Canada	100 Vine St.	Hamilton, Ont.
Gordon, D. K. Ltd.	Bernardo Avenue	Kelowna, B. C.
Poyntz, Arthur	790 St. Clair Ave. W.	Toronto, Ont.
Pure Food Meat Markets	1505 Gerrard St. E.	Toronto, Ont.
Sterling Food Markets Ltd.	724 Vancouver Block	Vancouver, B.C.
Swanwick, A.	428 King St. W.	Hamilton, Ont.
Wilson Bros. Ltd.	Hamilton St. and 12th Ave.	Regina, Sask.

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DOMINION BUREAU OF STATISTICS
INTERNAL TRADE BRANCH
OTTAWA, CANADA

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Food Chains in Canada, 1939 (Preliminary)

Notwithstanding a decrease in the number of stores in operation, dollar volume of business for food chains was 5.4 per cent greater in 1939 than in 1938 and reached the 1930 level for the first time since that year. There were 87 food chain companies in Canada in 1939 and these operated a total of 2,046 stores and had $127,890,800 sales. In 1938 there were 91 chain companies with 2,212 stores and $121,371,500 sales while in 1930, the earliest year for which comparable data are available, there were 87 chains with 2,352 stores and $127,582,500 sales. The figures for 1939 represent results of preliminary compilations for the Census of Merchandising and Service Establishments and relate to groups of four or more stores under the same ownership or management and dealing in grocery or meat products or in both groceries and meats. They do not include candy chains, restaurant chains or chains specializing in the sale of bakery products. Voluntary chains consisting of individual stores grouped for buying or advertising purposes are not included. A more detailed report is in course of preparation and will include in addition to the final figures for the items shown in this preliminary statement, tables presenting chain store figures for the larger cities and classifying individual stores according to amount of annual sales.

The decline in number of stores in operation between 1938 and 1939 represents a continuation of the policy adopted by retail food chains in recent years of closing out the smaller branches and developing the larger stores. Further evidence of this trend is to be found in a comparison of the average sales per store as determined from the total annual sales and the average number of stores in operation. Average sales per store for all food chains increased from approximately $58,000 in 1938 to $68,300 in 1939.

Increased business compared with 1938 was reported for all divisions of the country excepting the Province of Quebec where the reduction in number of stores in operation was proportionately greatest. In that province sales of $17,288,600 by 8 chains with 291 stores in 1939 were down by 9.2 per cent from the $19,031,600 recorded for 9 chains with 358 stores in 1938. Manitoba reported the greatest percentage increase, sales of 106 stores belonging to 5 chains exceeding by 16.9 per cent the dollar volume of the same 5 companies through 109 branches in 1938. Increases in dollar volume over 1938 for other divisions were as follows: British Columbia, 12.4 per cent; Saskatchewan, 9.5 per cent; Ontario, 7.2 per cent: the Maritime Provinces, 5.6 per cent, and Alberta, 3.7 per cent.

Of the 87 food chains coming within the scope of this survey 30 were grocery chains and these operated a total of 452 stores and had $17,966,900 sales. There were 43 combination store chains with 1,437 stores and $105,804,200 sales and there were 14 meat market chains with 157 stores and $4,119,700 sales. Not all units of the combination store chains sell both groceries and meat. Of the 1,437 units operated by combination chains, 901 or 62.7 per cent were of the combination type in which both groceries and fresh meat are sold. 533 or 37.1 per cent were purely grocery stores while there were 3 units of miscellaneous types. That the combination type of store is generally larger than the grocery unit is evident from the fact that the 901 combination stores belonging to combination chains, while forming 62.7 per cent of the total number of stores, accounted for over 81 per cent of the total annual business.

Table 1.--Number of Chains, Stores and Total Sales, by Years, 1930, 1934 and 1937 to 1939
(Grocery, Combination and Meat Market Chains Combined)

	1930	1934	1937	1938	1939
Number of Chains	87	86	89	91	87
Number of Stores:					
Maximum	2,352	2,395	2,287	2,212	2,046
Average(1)	2,218	2,310	2,179	2,093	1,872
Total Sales	$127,582,500	$104,912,800	$121,054,800	$121,371,500	$127,890,800
Chain Sales Index (1930 = 100.0)	100.0	82.2	94.9	95.1	100.2
Percentage change in sales from preceding year	-	+ 1.2	+ 8.6	+ 0.3	+ 5.4

(1) Computed from number at beginning, middle and end of each year

Table 1.--Number of Food Chains, Stores and Sales, by Provinces, 1930, 1937, 1938 and 1939 Compared

		1930	1937	1938	1939	% Change in Sales 1938-1939
CANADA, Total-	Chains	87	89	91	87	
	Stores(max.)	2,352	2,287	2,212	2,046	
	Sales	$127,582,500	$121,054,800	$121,371,500	$127,890,800	+ 5.4
British Columbia(1)-	Chains	19	15	14	13	
	Stores(max.)	246	294	283	267	
	Sales	$ 10,194,900	$ 12,010,900	$ 11,326,000	$ 12,726,900	+12.4
Alberta-	Chains	8	9	8	8	
	Stores(max.)	120	128	124	118	
	Sales	$ 5,587,000	$ 6,200,700	$ 6,296,500	$ 6,531,800	+ 3.7
Saskatchewan-	Chains	10	5	6	6	
	Stores(max.)	165	127	130	127	
	Sales	$ 6,969,300	$ 5,135,900	$ 5,193,700	$ 5,685,100	+ 9.5
Manitoba-	Chains	8	5	5	5	
	Stores(max.)	121	111	109	106	
	Sales	$ 5,689,100	$ 5,414,300	$ 4,974,500	$ 5,814,000	+16.9
Ontario-	Chains	37	45	48	47	
	Stores(max.)	1,107	1,101	1,076	1,004	
	Sales	$ 70,769,300	$ 66,561,000	$ 68,503,400	$ 73,459,400	+ 7.2
Quebec-	Chains	13	9	9	8	
	Stores(max.)	495	389	358	291	
	Sales	$ 23,708,400	$ 19,602,500	$ 19,031,600	$ 17,288,600	- 9.2
Maritime Provinces-	Chains	12	16	15	15	
	Stores(max.)	98	137	132	133	
	Sales	$ 4,664,500	$ 6,129,500	$ 6,045,800	$ 6,385,000	+ 5.6

(1) Includes Yukon and Northwest Territories

Table III.--Number of Grocery Chains, Stores and Total Sales, by Years, 1930, 1934 and 1937 to 1939

	1930	1934	1937	1938	1939
Number of Chains	43	40	31	31	30
Number of Stores:					
Maximum	748	746	498	484	452
Average	722	719	482	460	435
Total Sales	$44,698,400	$37,390,600	$20,167,700	$19,655,500	$ 17,966,900

Table IV.--Number of Combination Store Chains, Stores and Total Sales, by Years, 1930, 1934 and 1937 to 1939

	1930	1934	1937	1938	1939
Number of Chains	23	34	44	46	43
Number of Stores:					
Maximum	1,379	1,493	1,627	1,570	1,437
Average	1,282	1,440	1,542	1,478	1,288
Total Sales	$74,800,200	$63,484,300	$96,222,000	$97,194,300	$105,804,200

Table V.--Number of Meat Market Chains, Stores and Total Sales, by Years, 1930, 1934 and 1937 to 1939

	1930	1934	1937	1938	1939
Number of Chains	21	12	14	14	14
Number of Stores:					
Maximum	225	156	162	158	157
Average	214	151	155	155	149
Total Sales	$ 8,983,900	$ 4,037,900	$ 4,665,100	$ 4,521,700	$ 4,119,700

Table VI.--Kinds of Stores Operated by Combination Store Chains in 1939

Size of Chain	Number of Chains	Total Units(1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
			$		$		$
All Combination Store Chains, Total	43	1,437	105,804,200	533	19,794,700	901	85,913,000
Chains having -							
Less than 10 units.	32	185	12,279,700	30	1,473,900	153	10,790,100
10 to 99 units	6	123	5,155,800	46	1,307,200	77	3,848,600
100 units and over.	5	1,129	88,368,700	457	17,013,600	671	71,274,300

(1) These figures include a few stores other than grocery and combination stores

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA

CALENDAR YEAR

1939

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Food Chains in Canada, 1939

Final figures relating to the operations of food chains in Canada during 1939 vary but little from those contained in the preliminary bulletin issued earlier in the year. An average net increase of 5 per cent in dollar volume of food chain business over 1938 notwithstanding a decline of 8 per cent in number of units operated, a substantial reduction in chain business in the city of Montreal, a slight increase in the proportion of the total food retailing business secured by chains in all provinces except New Brunswick and Quebec and a continuation of the trend towards larger unit stores constitute the outstanding features of food chain operations in Canada last year.

There were 87 food chain companies in Canada in 1939, including grocery chains, combination store chains and meat market chains and these operated a total of 2,044 stores with annual sales of $127,945,900 or 30.7 per cent of the total annual business of all similar stores including both chains and independents. In the preceding year there were 91 chain store companies with 2,212 stores and $121,371,500 sales, an amount which formed 29.4 per cent of the total annual business of all food stores. Ratios of chain to total sales for earlier years were 29.3 per cent for 1937, 28.9 per cent for 1936, and 28.5 per cent for 1935. The ratio has changed but slightly since 1931 when it stood at 29.0 per cent.

The above ratios represent the proportion of chain sales to total sales for grocery stores, combination stores and meat markets combined. There are but a small number of chains engaged in the retailing of meat products only. When figures for straight meat markets are excluded from the calculations and data for grocery and combination stores only are considered the ratio of chain to total sales stands at 35.2 per cent for 1939 and 33.7 per cent for 1938.

Results on a provincial basis show that food chain sales increased in 1939 over 1938 in all provinces excepting Quebec while figures for individual cities of 30,000 population or over reveal that increases were general excepting in Montreal, Halifax and St. John. Food chain sales in British Columbia averaged 13 per cent higher in 1939 than in 1938; Vancouver sales were up by 19 per cent and Victoria 14 per cent. Alberta sales were up by 4 per cent with results for Calgary and Edmonton slightly better than the provincial average. Sales in Saskatchewan were up 10 per cent but the increase for Saskatoon was considerably greater at 17 per cent. Regina sales were up by 13 per cent. Chain sales in Manitoba gained 17 per cent. Ontario reported a gain of 7 per cent, results for individual cities ranging from an increase of 2 per cent in London to 16 per cent in Kitchener. Toronto chain sales were up 4 per cent, Hamilton 8 per cent and Ottawa 11 per cent.

A decline from 358 to 289 in the number of food chain units operating in Quebec province resulted in a decrease of 9 per cent in dollar volume of business. This must be attributed almost completely to a reduction in the number of stores operated in Montreal from 197 in 1938 to 143 in 1939, a reduction in units which was accompanied by a decrease of 25 per cent in dollar sales.

Chain sales in New Brunswick and Nova Scotia were up by 6 per cent, an increase of 14 per cent in the smaller localities more than offsetting declines of 6 per cent and 13 per cent in Halifax and St. John respectively.

The trend towards the operation of larger unit stores which has been evident during recent years was continued in 1939, the number of stores with annual sales of $100,000 or over and the proportion of the total chain business transacted by such stores providing some indication of this tendency. There were 313 units of food chains each with annual sales of $100,000 or more in 1939 and these transacted 47 per cent of the total business of all food chains. In the preceding year there were 263 stores above the same size limit and they accounted for 39 per cent of the total business; in 1937 there were 225 large stores doing 33 per cent of the business, while in 1934 there were only 152 similar sized stores and they accounted for only 16 per cent of the total chain trade. Or taking $300,000 as the lower limit it is found that there were 41 stores above this size in 1939, 22 in 1938, 14 in 1937 and only one in 1934.

The figures contained in the previous paragraph relate to the operations of corporate chains only; that is, groups of four or more units under the same ownership or management and engaged in the retail distribution of groceries, meats or groceries and meats together. Voluntary chains are not included. While information relating to the total annual turnover of voluntary chains is not available, statistics furnished by the affiliated wholesale firms give some indication of the development in this field. The absence of clearly defined methods of operation of these voluntary groups makes complete enumeration difficult but returns secured from 31 voluntary chain organizations in the food retailing field show 6,706 individual members whose purchases at wholesale prices from affiliated wholesalers amounted to $32,427,479 or an average of $4,836 per member. Of course, not all the food purchases by members of these voluntary chains are made from the affiliated wholesale houses. Nor are voluntary chains restricted to the sale of food products. Many of them are to be found amongst country general stores, affiliation in the voluntary chain group applying only in so far as the purchase of all or part of their food products is concerned.

A number of wholesalers who reported that they sponsored voluntary chains in earlier years indicated in their 1939 returns that the same privileges were now extended to all customers. There were 39 voluntary chains reported in 1938 with 7,158 members whose purchases from the affiliated wholesale houses amounted to $29,435,237.

Chain inventories were somewhat higher at the end of 1939 than at the close of the preceeing year. Store inventories increased from $6,238,100 at the end of 1938 to $6,605,200 at the end of 1939. The relative increase in warehouse inventories was considerably greater; warehouse stocks increased from $3,349,000 to $4,485,700 in the same comparison.

Customers' accounts outstanding on the books of food chain companies declined slightly from $1,601,400 at the end of 1938 to $1,470,500 at the close of 1939. Salaries and wages paid to store employees totalled $9,072,300 for 1939, practically unchanged from the preceding year.

Table 1.--Summary of Food Chain Stores in Canada, 1939

	Total Food Chains	Grocery Store Chains	Combination Store Chains	Meat Market Chains
Number of Chains	87	30	43	14
Number of stores, average(1)	1,867	433	1,285	149
Number of stores, maximum	2,044	452	1,435	157
Net Sales:				
Store sales	$127,945,900	$18,040,100	$105,786,100	$4,119,700
Total sales(2)	$131,907,500	$21,754,000	$106,033,800	$4,119,700
Stocks on hand, end of year, at cost:				
In retail stores	$ 6,605,200	$ 1,592,900	$ 4,908,200	$ 104,100
In warehouses	$ 4,485,700	$ 920,400	$ 3,546,800	$ 18,500
Salaries and wages	$ 9,072,300	$ 1,332,700	$ 7,268,700	$ 470,900
Total accounts outstanding, Dec. 31:				
Amount	$ 1,470,500	$ 402,000	$ 921,000	$ 147,500
Per cent of total sales	1.1	1.8	0.9	3.6

(1) Derived from number of units at beginning, middle and end of year.
(2) Includes any sales at wholesale prices direct from warehouses.

Table 2.--Kinds of Stores Operated by Combination Store Chains in 1938 and 1939

Size of Chain	Number of Chains	Total Units(1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
			$		$		$
1938							
All Combination Store Chains, Total	46	1,570	97,194,300	635	22,192,200	927	74,775,200
Chains having --							
Less than 10 units	34	194	12,668,100	42	1,963,700	146	10,575,700
10 - 99 units	7	136	5,196,300	56	1,513,800	79	3,678,300
100 units and over	5	1,240	79,329,900	537	18,714,700	702	60,521,200
1939							
All Combination Store Chains, Total	43	1,434	105,734,600	529	19,752,300	902	85,885,800
Chains having --							
Less than 10 units	32	185	12,279,700	30	1,473,900	153	10,790,100
10 - 99 units	6	120	5,086,200	42	1,264,800	78	3,821,400
100 units and over	5	1,129	88,368,700	457	17,013,600	671	71,274,300

(1) These figures include a few stores other than grocery and combination stores.

Table 3.--Principal Statistics of Food Chains by Provinces, 1930, 1933 and 1937 - 1939
(Grocery, Combination and Meat Market Chains Combined)

	1930	1933	1937	1938	1939
CANADA, Total(1)--					
Number of chains	87	91	89	91	87
No. of stores (maximum)	2,352	2,398	2,287	2,212	2,044
Net chain sales, amount	$127,582,500	$103,638,500	$121,054,800	$121,371,500	$127,945,900
Index, 1930 = 100 .	100.00	81.23	94.88	95.13	100.28
Total sales	$488,429,600	$347,397,000	$412,617,000	$412,292,000	$417,000,000
%, chains to total	26.1	29.8	29.3	29.4	30.7
British Columbia--					
Number of chains	19	17	15	14	13
No. of stores (maximum)	244	282	292	281	266
Net chain sales, amount	$ 10,117,100	$ 8,862,400	$ 11,888,200	$ 11,199,600	$ 12,653,300
Index, 1930 = 100 .	100.00	87.60	117.51	110.70	125.07
Total sales	$ 37,196,100	$ 24,455,000	$ 31,308,000	$ 30,575,000	$ 31,483,000
%, chains to total	27.2	36.2	38.0	36.6	40.2
Alberta--					
Number of chains	8	11	9	8	8
No. of stores (maximum)	120	127	128	124	119
Net chain sales, amount	$ 5,587,000	$ 4,519,100	$ 6,200,700	$ 6,296,500	$ 6,564,600
Index, 1930 = 100 .	100.00	80.89	110.98	112.70	117.50
Total sales	$ 23,469,400	$ 15,970,000	$ 20,089,000	$ 20,641,000	$ 20,590,000
%, chains to total	23.8	28.3	30.9	30.5	31.9
Saskatchewan--					
Number of chains	10	8	5	6	6
No. of stores (maximum)	165	138	127	130	127
Net chain sales, amount	$ 6,969,300	$ 4,177,600	$ 5,135,900	$ 5,193,700	$ 5,685,100
Index, 1930 = 100 .	100.00	59.94	73.69	74.52	81.57
Total sales	$ 21,690,500	$ 13,109,000	$ 15,006,000	$ 15,020,000	$ 15,678,000
%, chains to total	32.1	31.9	34.2	34.6	36.3
Manitoba--					
Number of chains	8	6	5	5	5
No. of stores (maximum)	121	110	111	109	106
Net chain sales, amount	$ 5,689,100	$ 4,697,600	$ 5,414,300	$ 4,974,500	$ 5,814,000
Index, 1930 = 100 .	100.00	82.57	95.17	87.44	102.20
Total sales	$ 22,225,200	$ 15,480,000	$ 18,480,000	$ 18,318,000	$ 18,975,000
%, chains to total	25.6	30.3	29.3	27.2	30.6
Ontario--					
Number of chains	37	37	45	48	47
No. of stores (maximum)	1,107	1,113	1,101	1,076	1,002
Net chain sales, amount	$ 70,769,300	$ 55,450,700	$ 66,561,000	$ 68,503,400	$ 73,459,400
Index, 1930 = 100 .	100.00	78.35	94.05	96.80	103.80
Total sales	$206,749,300	$146,528,000	$174,393,000	$173,440,000	$176,509,000
%, chains to total	34.2	37.8	38.2	39.5	41.6
Quebec--					
Number of chains	13	12	9	9	8
No. of stores (maximum)	495	472	389	358	289
Net chain sales, amount	$ 23,708,400	$ 20,456,500	$ 19,602,500	$ 19,031,600	$ 17,259,200
Index, 1930 = 100 .	100.00	86.28	82.68	80.27	72.80
Total sales	$140,527,500	$104,204,000	$119,267,000	$120,765,000	$119,533,000
%, chains to total	16.9	19.6	16.4	15.8	14.4
New Brunswick--					
Number of chains	5	5	5	5	5
No. of stores (maximum)	30	41	36	36	36
Net chain sales, amount	$ 1,267,300	$ 1,519,900	$ 1,480,800	$ 1,408,100	$ 1,428,800
Index, 1930 = 100 .	100.00	119.93	116.85	111.11	112.74
Total sales	$ 13,117,200	$ 9,638,000	$ 11,461,000	$ 11,169,000	$ 11,404,000
%, chains to total	9.7	15.8	12.9	12.6	12.5
Nova Scotia--					
Number of chains	9	14	13	12	12
No. of stores (maximum)	66	113	100	95	96
Net chain sales, amount	$ 3,189,100	$ 3,844,700	$ 4,535,800	$ 4,531,400	$ 4,863,100
Index, 1930 = 100 .	100.00	120.56	142.23	142.09	152.49
Total sales	$ 21,248,900	$ 16,313,000	$ 20,490,000	$ 20,303,000	$ 20,757,000
%, chains to total	15.0	23.6	22.1	22.3	23.4

(1)Includes Prince Edward Island, Yukon and Northwest Territories.

Table 4.--Food Chain Stores and Sales by Provinces and Principal Cities, 1938 and 1939

Province and City	Number of Stores		Value of Sales		
	1938	1939	1938	1939	Per cent of change
			$	$	
CANADA, Total(1)	2,212	2,044	121,371,500	127,945,900	+ 5.4
Places 30,000 and over, total	1,234	1,105	68,576,000	70,282,800	+ 2.5
Places under 30,000, total	978	939	52,795,500	57,663,100	+ 9.2
British Columbia, Total	281	266	11,199,600	12,653,300	+ 13.0
Places 30,000 and over, total	177	163	6,861,000	8,089,700	+ 17.9
Vancouver	164	150	5,848,900	6,940,000	+ 18.7
Victoria	13	13	1,012,100	1,149,700	+ 13.6
Places under 30,000, total	104	103	4,338,600	4,563,600	+ 5.2
Alberta, Total	124	119	6,296,500	6,564,600	+ 4.3
Places 30,000 and over, total	76	75	3,922,400	4,145,400	+ 5.7
Calgary	51	50	2,520,700	2,651,700	+ 5.2
Edmonton	25	25	1,401,700	1,493,700	+ 6.6
Places under 30,000, total	48	44	2,374,100	2,419,200	+ 1.9
Saskatchewan, Total	130	127	5,193,700	5,685,100	+ 9.5
Places 30,000 and over, total	42	42	2,117,900	2,430,300	+ 14.8
Regina	27	27	1,252,100	1,414,000	+ 12.9
Saskatoon	15	15	865,800	1,016,300	+ 17.4
Places under 30,000, total	88	85	3,075,800	3,254,800	+ 5.8
Manitoba, Total	109	106	4,974,500	5,814,000	+ 16.9
Places 30,000 and over, total	93	90	(X)	(X)	(X)
Winnipeg(2)	93	90	(X)	(X)	(X)
Places under 30,000, total	16	16	(X)	(X)	(X)
Ontario, Total	1,076	1,002	68,503,400	73,459,400	+ 7.2
Places 30,000 and over, total	563	519	36,311,800	38,292,100	+ 5.5
Brantford	13	14	980,800	1,014,100	+ 3.3
Hamilton	124	122	5,609,700	6,038,100	+ 7.6
Kitchener	5	5	738,400	858,800	+ 16.3
London	28	24	1,935,200	1,980,800	+ 2.4
Ottawa	50	45	3,469,200	3,860,300	+ 11.3
Toronto(3)	277	251	20,948,800	21,681,700	+ 3.5
Windsor	66	58	2,629,700	2,858,300	+ 8.7
Places under 30,000, total	513	483	32,191,600	35,167,300	+ 9.2
Quebec, Total	358	289	19,031,600	17,259,200	- 9.3
Places 30,000 and over, Total	238	176	13,275,400	10,676,700	- 19.6
Montreal(4)	197	143	10,878,300	8,180,400	- 24.8
Quebec	4	4	(X)	(X)	(X)
Three Rivers	6	5	(X)	(X)	(X)
Verdun	31	24	1,741,600	1,776,800	+ 2.0
Places under 30,000, total	120	113	5,756,200	6,582,500	+ 14.4
New Brunswick and Nova Scotia, Total	131	132	5,939,500	6,291,900	+ 5.9
Places 30,000 and over, total	45	40	2,137,000	1,971,100	- 7.8
Halifax	33	32	1,554,200	1,465,200	- 5.7
Saint John	12	8	582,800	505,900	- 13.2
Places under 30,000, total	86	92	3,802,500	4,320,800	+ 13.6

(1) Includes Prince Edward Island, Yukon and Northwest Territories. (2) Includes suburbs. (3) Toronto proper only. (4) Montreal proper only. (X) Indicates that figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 5.--Chain Units Classified According to Amount of Annual Sales, by Years

(Grocery, Combination and Meat Markets)

Amount of Annual Sales	1934				1937				1938				1939			
	Number of Stores	Sales			Number of Stores	Sales			Number of Stores	Sales			Number of Stores	Sales		
		Amount	%	Cum. %		Amount	%	Cum. %		Amount	%	Cum. %		Amount	%	Cum. %
$		$				$				$				$		
300,000 & over	1	302,700	.29	.29	14	4,959,800	4.10	4.10	22	7,667,800	6.32	6.32	41	14,844,400	11.60	11.60
200,000-299,999	24	5,639,700	5.38	5.67	54	12,874,600	10.64	14.74	62	15,166,200	12.50	18.82	69	16,855,500	13.17	24.77
100,000-199,999	127	16,843,900	16.06	21.73	157	21,721,100	17.94	32.68	179	24,618,600	20.28	39.10	203	28,511,900	22.28	47.05
50,000- 99,999	566	38,138,600	36.35	58.08	612	41,514,500	34.29	66.97	522	35,532,300	29.28	68.38	532	36,767,700	28.74	75.79
30,000- 49,999	594	23,164,600	22.08	80.16	625	24,408,900	20.16	87.13	580	22,719,100	18.72	87.10	473	18,315,600	14.32	90.11
20,000- 29,999	543	13,529,700	12.90	93.06	414	10,268,700	8.48	95.61	402	10,013,400	8.25	95.35	331	8,241,200	6.44	96.55
10,000- 19,999	413	6,631,300	6.32	99.38	289	4,584,000	3.79	99.40	314	4,881,700	4.02	99.37	240	3,618,900	2.83	99.38
5,000- 9,999	69	506,800	.48	99.86	73	570,600	.47	99.87	82	629,500	.52	99.89	80	591,100	.46	99.84
Less than 5,000	58	155,500	.14	100.00	49	152,600	.13	100.00	49	142,900	.11	100.00	75	199,600	.16	100.00

Table 6.--Voluntary Food Chains in Canada, 1930 - 1939

(Number of Chains, Stores, Value of Purchases and Average Purchases per Store)

Year	Number of Chains	Number of Stores	Total Purchases by Members (at Wholesale Prices)	Average Purchases Per Store	Index of Purchases (1930 = 100)
			$	$	
1930	23	4,472	22,720,500	5,081	100.0
1931	26	5,198	23,626,800	4,545	104.0
1932	26	5,790	25,433,100	4,392	111.9
1933	27	6,025	26,725,400	4,435	117.6
1934	23	5,659	26,842,200	4,743	118.1
1935(1).....	30	6,525	27,703,200	4,246	121.9
1936	32	6,670	27,336,200	4,098	120.3
1937	37	6,949	28,417,700	4,089	125.1
1938	39	7,158	29,435,200	4,112	129.6
1939	31	6,706	32,427,500	4,836	142.7

(1) Revised figures.

LIST OF FOOD CHAINS IN CANADA

Grocery Store Chains

B. & K. Economy Cash Stores Ltd.	1484 W. Broadway	Vancouver, B.C.
Bassin's Food Markets	405 Jane St.	Toronto, Ont.
Black & White Stores	10402 - 97th St.	Edmonton, Alta.
Carroll's Limited	19 Hughson St. S.	Hamilton, Ont.
Charbonneau, L.A.	127 Hotel de Ville	Hull, Que.
Curry's Grocery	6115 Fraser St.	Vancouver, B.C.
The T. Eaton Co. Ltd. (Ontario Groceterias)		Toronto, Ont.
Elliott's Stores Ltd.	5339 West Boulevard	Vancouver, B.C.
Gowman, The Grocery	181 Colborne St.	Brantford, Ont.
Hickman Stores, The	843 Bank St.	Ottawa, Ont.
Jenkins Groceteria Ltd. (Alberta)	702 - 9th Ave. W.	Calgary, Alta.
Jewel Stores Ltd.	592 Main St.	Winnipeg, Man.
McBride's Limited	1333 Garnet St.	Regina, Sask.
Model Grocery Ltd.	308 - 6th St.	New Westminster, B.C.
Neal Brothers Ltd.	283 Stanley St.	Winnipeg, Man.
O. K. Economy Stores	301 Ontario Ave.	Saskatoon, Sask.
Overwaitea Ltd.	1181 Richards St.	Vancouver, B.C.
Quality Groceterias Company	71 Emerald St. S.	Hamilton, Ont.
Ramsay's Market		Petrolia, Ont.
Steinberg's Wholesale Groceterias Ltd.	445 River St.	Verdun, Que.
Sterling Stores Ltd.	605 Barrington St.	Halifax, N.S.
Superior Stores (B. C.) Ltd.	207 W. Hastings St.	Vancouver, B.C.
Tait, Harry Groceterias Ltd.	10012 - 101st Ave.	Edmonton, Alta.
Thomas Bros.	438 Dundurn St.	Hamilton, Ont.
Thomson Groceries Ltd.	Rear of 302 Greenwood Ave.	Toronto, Ont.
Toronto Grocery Stores	290 Queen St. E.	Toronto, Ont.
United Pure Food Stores Regd.	960 St. Paul St. W.	Montreal, Que.
Welch, H. W. Ltd.	Deer Island	Leonardville, N.B.
Wilbie's Service Stores	6027 Fraser St.	Vancouver, B.C.
Ziebell, A.	149 Pembroke St. W.	Pembroke, Ont.

Combination Store Chains

Acadia Stores Limited	32 Spring Garden Rd.	Halifax, N.S.
Adam and Co. Limited	42 Borgia St.	Sudbury, Ont.
Barker's Stores Ltd.	Provost St.	New Glasgow, N.S.
Barker's Grocery	100 Princess St.	Saint John, N.B.
Boyle, H.J. Co. Ltd.	168½ Charlotte St.	Peterboro, Ont.
Butti, Sam	268 Ferguson St.	North Bay, Ont.
Buywell Food Markets Inc.	1319 St. Catherine St.	Montreal, Que.
Buy Right, The Stores Ltd.	521 - 525 Gottingen St.	Halifax, N.S.
Campbellton's Cash & Carry Stores	Union St.	Campbellton, N.B.
Consumer's Cooperative Society Ltd.	64 - 4th Ave.	Timmins, Ont.
Cosmopolitan, The Stores	214 Townsend St.	Sydney, N.S.
Curtis Markets	1028 Pape Ave.	Toronto, Ont.
David's Markets Ltd.	106 Townsend St.	Sydney, N.S.
Dominion Stores Limited	3 Sullivan St.	Toronto, Ont.
T. Eaton Co. Ltd. (Maritime Groceterias)		Toronto, Ont.
T. Eaton Co. Ltd. (Western Groceterias)		Toronto, Ont.
Empire Meat Co. Ltd.	330 - 2nd Ave. S.	Saskatoon, Sask.
Fitzpatrick and Geraghty Ltd.	196 Rubidge St.	Peterborough, Ont.
Gilmer and Thomson	26 Queen St.	St. Catharines, Ont.
Great A. & P. Tea Co. Ltd., The	135 Laughton Ave.	Toronto, Ont.
International Provisions Co. Ltd.	626 Barrington St.	Halifax, N.S.
Loblaw Groceterias Co. Ltd.	Fleet & Bathurst Sts.	Toronto, Ont.
Luckin's Ltd.	4 Parkhurst Blvd.	Toronto, Ont.
M. & P. Stores Ltd.	375 Sandwich St. W.	Windsor, Ont.
MacDonald, B.O.	64 Windsor St.	Halifax, N.S.
Mason's Grocery Stores	429 George St.	Peterborough, Ont.
Miracle Marketerias Ltd.	2424 Yonge St.	Toronto, Ont.
Phillips Markets Ltd.	805 Howard Ave.	Windsor, Ont.
Pinch, The J.C. Stores	536 Queen St.	Sault Ste. Marie, Ont.
Powell and Co. Ltd.	Cor. King & Main Sts.	Dundas, Ont.
Power Food, The Markets	118 King St. E.	Toronto, Ont.

LIST OF FOOD CHAINS IN CANADA--(Contd.)

Combination Store Chains--(Contd.)

Progressive Trading Cooperative Ltd.	638 Queen St. W.	Toronto, Ont.
Quality Food Stores	420 Bathurst St.	Toronto, Ont.
Ray's Limited	1105 Dominion Bldg.	Vancouver, B.C.
Safeway Stores Ltd.	313 Pacific Ave.	Winnipeg, Man.
Shop-Easy Stores Limited	312 Confederation Life Bldg.	Winnipeg, Man.
Shoprite Stores	1502 - 12th Ave. W.	Calgary, Alta.
Shore, Max	3 Ingraham's Lane	Glace Bay, N.S.
Sobey, J.W.		Stellarton, N.S.
Sosowsky & Slobodsky, Messrs.	546 Simpson St.	Fort William, Ont.
Thrift Stores Limited	960 Outremont Ave.	Montreal, Que.
Whyte Packing Company, The Ltd.	Linton Ave.	Stratford, Ont.
Worker's Cooperative of New Ontario Ltd.	64 - 3rd Ave.	Timmins, Ont.

Meat Market Chains

Brooker's Meat Market	Talbot St. E.	Leamington, Ont.
Buehler Bros. Limited	2896 Dundas St. W.	Toronto, Ont.
Burns and Co. Limited		Calgary, Alta.
Calvert, Willis	1232 Dundas St. W.	Toronto, Ont.
Collins, Len	475 Danforth Ave.	Toronto, Ont.
Cooper, Joseph Ltd.	466 Queen St. W.	Toronto, Ont.
Cross' Stores	1310 - 1312 Douglas St.	Victoria, B.C.
Duff's Meat Stores and Master Meat Markets Co. of Canada	100 Vine St.	Hamilton, Ont.
Gordon, D.K. Ltd.	Bernard Ave.	Kelowna, B.C.
Poyntz, Arthur	790 St. Clair Ave. W.	Toronto, Ont.
Pure Food Meat Markets	1505 Gerrard St. E.	Toronto, Ont.
Sterling Food Markets Ltd.	724 Vancouver Block	Vancouver, B.C.
Swanwick, A.	428 King St. W.	Hamilton, Ont.
Wilson Bros. Ltd.	2010 - 12th Ave.	Regina, Sask.

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DOMINION BUREAU OF STATISTICS
INTERNAL TRADE BRANCH
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Series 1940 - No. 5 Price, 10 cents

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Food Chains in Canada, 1940 (Preliminary)

Dollar sales for 1940 of 80 chain store companies in the food retailing field in Canada were up 13 per cent over the amount of business transacted by 87 chains in 1939. The 80 chains operated a total of 1,808 individual stores in 1940 and had sales of $144,943,500 while the 87 chains in the earlier period had 2,044 stores and $127,945,900 sales. The decline in number of stores in operation between the two years results from the continuation of the policy adopted by retail food chains in recent years of closing out the smaller branches and developing the larger stores. Further evidence of this trend may be seen in a comparison of the average sales per store as determined from the total annual sales and the average number of stores operated each year. Average sales per store for food chains increased by 26 per cent from $68,500 in 1939 to $86,500 in 1940.

Increased sales compared with 1939 were reported for all regions of the country, the percentage gains ranging from 2 per cent in the Maritime Provinces to 24 per cent in Manitoba with increases for other provinces as follows: British Columbia, 18 per cent; Ontario, 14 per cent; Alberta, 11 per cent; Saskatchewan, 11 per cent and Quebec, 8 per cent.

Of the 80 chain companies included in this survey, 21 were grocery chains operating grocery units only and these had 379 stores and $16,605,600 sales. There were 44 combination store chains with 1,267 stores and $124,092,700 sales. Not all the units of combination chains sell both groceries and meat. Of the 1,267 stores operated by these chains 405 were purely grocery stores and these had sales of $18,362,500; 850 were units of the combination meat and grocery type with sales of $[illegible],477,200, while 12 were classified under other lines of business. The schedules used for the 1940 survey asked for separate details regarding meat sales only in combination stores but unfortunately a considerable number of the smaller chains were unable to furnish a breakdown between meat and grocery receipts. The four largest chains, each with more than 100 stores, were able to give this breakdown. These 4 chains operated a total of 847 stores with $97,525,200 sales of which 287 units were straight grocery stores with sales of $13,362,900. The 847 stores also included 559 units of the combination type whose sales totalled $84,159,500 and of which meat sales amounted to $17,645,000 or approximately 21 per cent.

The 1940 figures given in this report represent results of preliminary compilations for the Census of Merchandising and Service Establishments and relate to groups of four or more stores under the same ownership or management and dealing in grocery or meat products or in both groceries and meats. They do not include candy chains, restaurant chains or chains specializing in the sale of bakery products. Voluntary chains consisting of individual stores grouped for buying or advertising purposes are not included.

Table I.--Number of Chains, Stores and Total Sales, by Years, 1930, 1934 and 1938 to 1940
(Grocery, Combination and Meat Market Chains Combined)

	1930	1934	1938	1939	1940
Number of Chains	87	86	91	87	80
Number of Stores:					
Maximum	2,352	2,395	2,212	2,044	1,808
Average(1)	2,218	2,310	2,093	1,867	1,675
Total Sales	$127,582,500	$104,912,800	$121,371,500	$127,945,900	$144,943,500
Chain Sales Index (1930 = 100.0)	100.0	82.2	95.1	100.3	113.6
Percentage change in sales from preceding year	-	+ 1.2	+ 0.3	+ 5.4	+13.3

(1) Computed from number at beginning, middle and end of each year.

Table II.--Number of Food Chains, Stores and Sales, by Provinces, 1930, 1938, 1939 and 1940 Compared

		1930	1938	1939	1940	% Change in Sales
CANADA, Total	Chains	87	91	87	80	
	Stores (max.)	2,352	2,212	2,044	1,808	
	Sales	$127,582,500	$121,371,500	$127,945,900	$144,943,500	+ 13.3
British Columbia(1)	Chains	19	14	13	13	
	Stores (max.)	246	283	266	254	
	Sales	$ 10,194,900	$ 11,326,000	$ 12,653,300	$ 14,974,300	+ 18.3
Alberta	Chains	8	8	8	9	
	Stores (max.)	120	124	119	122	
	Sales	$ 5,587,000	$ 6,296,500	$ 6,564,600	$ 7,309,600	+ 11.3
Saskatchewan	Chains	10	6	6	6	
	Stores (max.)	165	130	127	124	
	Sales	$ 6,969,300	$ 5,193,700	$ 5,685,100	$ 6,291,800	+ 10.7
Manitoba	Chains	8	5	5	5	
	Stores (max.)	121	109	106	96	
	Sales	$ 5,689,100	$ 4,974,500	$ 5,814,000	$ 7,186,700	+ 23.6
Ontario	Chains	37	48	47	44	
	Stores (max.)	1,107	1,076	1,002	874	
	Sales	$ 70,769,300	$ 68,503,400	$ 73,459,400	$ 83,967,900	+ 14.3
Québec	Chains	13	9	8	7	
	Stores (max.)	495	358	289	223	
	Sales	$ 23,708,400	$ 19,031,600	$ 17,259,200	$ 18,673,400	+ 8.2
Maritime Provinces	Chains	12	15	15	12	
	Stores (max.)	98	132	133	115	
	Sales	$ 4,664,500	$ 6,045,800	$ 6,396,300	$ 6,539,800	+ 2.2

(1) Includes Yukon and Northwest Territories

Table III.--Number of Grocery Chains, Stores and Total Sales, by Years, 1930, 1934 and 1938 to 1940

	1930	1934	1938	1939	1940
Number of Chains ...	43	40	31	30	21
Number of Stores:					
Maximum	748	746	484	452	379
Average	722	719	460	433	367
Total Sales	$44,698,400	$37,390,600	$19,655,500	$18,040,100	$16,605,600

Table IV.--Number of Combination Store Chains, Stores and Total Sales, by Years, 1930, 1934 and 1938 to 1940

	1930	1934	1938	1939	1940
Number of Chains ...	23	34	46	43	44
Number of Stores:					
Maximum	1,379	1,493	1,570	1,435	1,267
Average	1,282	1,440	1,478	1,285	1,163
Total Sales	$74,800,200	$63,484,300	$97,194,300	$105,786,100	$124,092,700

Table V.--Number of Meat Market Chains, Stores and Total Sales, by Years, 1930, 1934 and 1938 to 1940

	1930	1934	1938	1939	1940
Number of Chains ...	21	12	14	14	15
Number of Stores:					
Maximum	225	156	158	157	162
Average	214	151	155	149	145
Total Sales	$ 8,083,900	$ 4,037,900	$ 4,521,700	$ 4,119,700	$ 4,245,200

Table VI.--Kinds of Stores Operated by Combination Store Chains in 1940

Size of Chain	Number of Chains	Total Units(1)		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
			$		$		$
All Combination Store Chains, Total	44	1,267	124,092,700	405	18,362,500	850	105,477,200
Chains having --							
Less than 10 units	31	176	12,690,300	29	1,433,300	136	11,006,800
10 to 99 units ...	9	244	13,877,200	89	3,566,300	155	10,310,900
100 units and over	4	847	97,525,200	287	13,362,900	559	84,159,500

(1) These figures include a few stores other than grocery and combination stores.

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Minister of Trade and Commerce

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS

IN

CANADA

CALENDAR YEAR

1941

OTTAWA
1944

Price 25 cents

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA, 1941

SUMMARY

Total sales of the food chains in 1941 amounted to $177,405,900, representing an increase of 39.1 per cent over the total dollar volume obtained by all food chains in 1930. During the same period the maximum number of stores operated by the food chains dropped from 2,352 in 1930 to 1,707 outlets in 1941. Sales of the food chains in 1941 exceeded those of the earlier year in all provinces except Saskatchewan where a slight decrease was recorded, but the percentage rates of increase in the other provinces varied sharply from the average for the Dominion. In both years, however, sales of chain food stores in Ontario, Quebec, and British Columbia provided slightly over four-fifths of the total sales volume.

Three phases in the operations of the food chains are apparent during the eleven-year period. Thus, in the 1930-1934 period, sales dropped from $127,582,500 in 1930 to $104,912,800 in the latter year associated with a slight increase in the number of stores operated; between 1934 and 1937, total sales rose to $121,054,800 accompanied by a slight drop in stores operated; and between 1937 and 1941 total sales of the food chains rose sharply to $177,405,900 notwithstanding a decrease of 580 chain units in the number of stores operated.

During 1941, the food chains secured about 27 per cent of the total sales made by all grocery, combination and meat and fish market stores in Canada, slightly greater than the share of the market obtained by the food chains in 1930. The competitive situation in Ontario and British Columbia, however, was apparently much keener than in the other provinces, the percentage of chain to total sales between 1930 and 1941 rising from 34 per cent to 38 per cent in Ontario, and from 27 per cent to 34 per cent in British Columbia. When examined by size of locality, the food chains are found to have increased their share of the available market between 1930 and 1941 in places with populations of 30,000 to 100,000, and in places with populations of 100,000 and over, maintained their position in locality-size groups of 10,000 to 30,000 and lost some ground in smaller places of less than 10,000 population.

A marked trend toward a reduction in total number of units and a progressively increasing number of stores with sharply larger individual sales volumes is apparent between 1934 and 1941. This movement was even more pronounced between 1937 and the later year when a sharp reduction in the number of stores with annual sales volumes of less than $100,000 per store coincided with a considerable increase in the number of units having annual sales in excess of $100,000 per store. A particularly noteworthy development during this period is the appearance of units with very large annual sales volumes. Thus, 14 stores in 1937 had individual sales ranging between $300,000 and $500,000 per store; in 1941, however, 110 units were classified in this group, and an additional 38 outlets experienced sales volumes between $500,000 and $1,000,000 per year.

The interval between 1930 and 1941 was also characterized by a closure of many of the older chain units accompanied by the opening of fewer new outlets promising greater profits and larger sales volumes. Thus, of the 1,882 chain food stores which were in operation in 1930 and established previously to that year, only 652 were reported in business in 1941. This represents the closure of 1,230 units, or 65 per cent of those stores which in 1930 had been in operation for at least one year. Conversely, of the stores opened by the food chains between 1929 and 1941, 1,007 outlets were still in business during the recent census year. While complete data on the openings and closings of stores are not available for the inter-censal period, it is apparent that a major turnover in the number of stores used by the food chains occurred within this period.

GENERAL ANALYSIS

Introduction

The food chains analyzed in this report are enterprises with four or more retail outlets and consist of three types of organizations: grocery chains, combination chains, and meat and fish market chains. For purposes of classification, grocery stores are considered to be those which do not handle fresh meats and in which sales of groceries predominate; combination stores are those which handle both groceries and fresh meats; meat and fish stores are those which specialize principally in the sale of either of these types of commodities. Fresh fruits and vegetables, however, are sold in almost all grocery and combination stores. Food chains are classified into the above types on the basis of the kind of food stores predominating within each chain organization. Thus, each of these three types of chain may contain a minority of individual chain outlets differing from the classification of the chain as a whole. Grocery chains, according to Table 3, operated 448 stores in 1941, of which 22 were combination units and 14 consisted of other kinds. Combination chains in the same year had 1,093 stores in operation, of which 323 were grocery outlets and 8 belonged to other types.

In this report different comparisons are made between statistics obtained from the first complete Census of Merchandising for 1930 and those provided by the second complete Census of Merchandising for 1941. These comparisons reveal various changes which occurred in the positions of the food chains during the inter-censal period. Some comments are therefore required on the appropriate statistics of each census year.

In 1941, the total dollar value of retail trade through all types of retail stores amounted to $3,440,901,700, exceeding by 24.9 per cent retail sales of $2,755,569,900 obtained in 1930. Total retail sales of all grocery, combination, and meat and fish market stores (included in the grand totals) amounted to $650,630,700 in 1941, an increase of 32.2 per cent over the dollar volume of such stores in 1930. Reflecting in part a trend toward the combination type of food store, sales of these outlets in 1941 were 86.4 per cent above the dollar volume obtained in 1930; sales of grocery stores in 1941 recorded an increase of 9.2 per cent over 1930; and the dollar volume of meat and fish stores in 1941 was unchanged from the earlier period.

Total sales of the food chains in 1941 recorded a sharp increase over the dollar volume recorded in 1930, the increase on a percentage basis amounting to 39.1 per cent for the Dominion. The Bureau's retail food price index for chain food stores, however, showed a higher level of food prices in 1930 prevailing than in 1941, the yearly averages of these indexes for the two years, on the base 1935-1939 = 100, standing at 122.3 and 114.9 respectively. In terms of the physical turnover of merchandise, therefore, the increase between the two years was even greater than the 39.1 per cent mentioned above.

Table I presents the comparative position of all food chains in 1930 and 1941 for Canada, for the provinces, and for regional areas of the Dominion. Both the number of food chains and the number of chain outlets in the Dominion decreased between these years. On the other hand, the total dollar volume of food chains in 1941 exceeded that of 1930 by about 39 per cent accompanied by an even greater increase in average sales per store of 91.6 per cent.

Although food chains increased their share of the total sales volume of all grocery, combination and meat and fish stores in Canada from 26.1 per cent in 1930 to 27.4 per cent in 1941, this change was by no means uniform for the different provinces of the Dominion. In Ontario, sales of food chains accounted for 37.9 per cent of the sales of all of these kinds of retail outlets in 1941 compared with 34.2 per cent in 1930, and in British Columbia the sales of the food chains comprised 34.3 per cent of total sales of these stores in 1941 against a corresponding figure of 27.2 per cent in the previous census year. The food chains likewise increased their share of the retail food business in Alberta, Manitoba, and the Maritime Provinces in 1941 over that obtained in 1930. In Quebec and Saskatchewan, however, the food chains lost ground, the percentages dropping from 16.9 per cent to 15.0 per cent between 1930 and 1941 for the former province, and from 32.1 per cent to 29.6 per cent for the province of Saskatchewan.

Average sales per chain outlet have shown a sharp increase between the two census years in all provinces of the Dominion. The greatest gains in average sales per store occurred in Quebec, Manitoba and Ontario with percentage increases over 1930 amounting to 177.8 per cent, 106.4 per cent, and 96.7 per cent respectively. Quebec and Ontario were the only two provinces in which average dollar volume per chain outlet for 1941 exceeded $100,000 but Manitoba nearly attained this figure having an average turnover of about $97,000. Quebec is particularly noteworthy in that while the number of food chains and the number of stores each declined by about 46 per cent between 1930 and 1941, the increase in sales per outlet amounted to 177.8 per cent and average sales per store of $133,071 was the highest average attained in any of the provinces. This development in the province of Quebec no doubt reflects the impact of chain store taxes introduced by the provincial government during the intercensal period.

Distribution of Sales by Kind of Chain

Combination chains secured about 83 per cent of the sales of all food chains in 1941. Grocery chains obtained about 15 per cent of the total sales of the food chains during the same year and the balance of the business was done by the meat and fish market chains.

The importance of combination stores in terms of volume of sales is emphasized by the statistics contained in Table 3. Thus, a total of 784 combination stores, operated by both grocery and combination chains, obtained sales of $131,823,500 in 1941, or 76.5 per cent of the total dollar volume of both kinds of chains. The 735 grocery stores operated by these chains with total sales of $39,936,200 on the other hand, accounted for about 22 per cent of the total sales of both grocery and combination chains.

Both the number of combination units operated by such chains and the importance of the sales of these outlets have increased between 1930 and 1941. In 1930, combination chains operated 698 combination outlets comprising 51 per cent of all of their stores, and these units did 69 per cent of the total dollar volume of such chains; in 1941, combination outlets comprised 69 per cent of the stores operated and accounted for about 87 per cent of the sales of combination chains.

Trends to Larger Sales Volume Stores

Since 1934 a marked trend may be observed in the chain food trade toward progressively greater individual store volumes accompanied by decreasing numbers of chain outlets in operation. This movement was even more pronounced between 1937 and 1941, when a sharp reduction in the number of stores with annual sales volumes of less than $100,000 per store coincided with a considerable increase in the number of units with annual sales in excess of $100,000 per store. The trend to units with annual sales volumes in excess of $200,000 is even more noteworthy. Thus, in 1934, according to the data presented in Table 4, there were only 25 chain outlets with individual store sales of $200,000 and over, and these units transacted 5.67 per cent of the sales made by the food chains. In 1937, 68 units with individual sales of $200,000 and over accounted for 14.74 per cent of all food chain sales. By 1941, however, the dollar volume of stores with sales of $200,000 and over comprised 50.93 per cent of the total dollar volume of all food chains. In the same year, moreover, 38 units or 2.2 per cent of the outlets operated by the food chains obtained individual annual sales of $500,000 and over, and these units accounted for 13.08 per cent of the total sales of the food chains in that year.

Table 5 contrasts chain and independent food stores according to amount of annual sales in 1941. The major portion of the business of independent stores is done by outlets with sales of less than $100,000 per unit. This is in marked contrast to the experience of food chain stores in 1941 where nearly three-quarters of the business was done by units with annual sales of $100,000 and over. Thus, while 89.8 per cent of the sales of independent food stores are made by outlets with sales volumes of less than $100,000 per year, 73.1 per cent of the sales of the food chains are made by units with annual turnovers of $100,000 and over, and only 13.8 per cent of the business is done by chain stores with store volumes between $50,000 and $100,000 per year. It is also interesting to note that 75.1 per cent of the sales of independent food stores are made by those units whose individual store volumes range between $10,000 and $100,000 per year, with a fairly even distribution of these sales between the four-size ranges comprising the $10,000 to $100,000 group.

Distribution of Chain Store Sales by Locality Sizes

Table 6 presents statistics for 1941 on the number and sales of food chain stores classified by provinces and by size of locality. By size of locality, the percentage distribution of the sales of all food chains in 1941 is not markedly different from that prevailing in the previous census year. Chain units situated in centers ranging between 30,000 and 100,000 population obtained a slightly larger share of the total sales of food chains in 1941 than in the former census year. The percentages by size of locality for the two census years are as follows:

Distribution of Food Chain Sales, by Size of Locality

Size of locality	1930	1941
	%	%
Total, all localities	100.00	100.00
100,000 and over	44.52	44.18
30,000 - 99,999	12.75	17.23
10,000 - 29,999	18.30	17.12
1,000 - 9,999	19.34	16.33
Under 1,000	5.09	5.13

Since the sales of food chains are concentrated principally in the larger urban centers, the distribution of sales in the various provinces is heavily influenced by the different patterns of urbanization. To illustrate, there were no cities in either Alberta or Saskatchewan in 1941 with populations of over 100,000 persons, and localities ranging between 30,000 and 100,000 people provided 66.5 per cent and 48.3 per cent of the sales of the food chains in these provinces. In Nova Scotia where there were also no cities with more than 100,000 persons, sales of the food chains were divided fairly equally between centers ranging between 30,000 to 100,000, 10,000 to 30,000, and 1,000 to 10,000 people, while only a small percentage of the business was done in the rural localities. On the other hand, there were no cities in Manitoba ranging in size between 30,000 and 100,000 people and sales of chain stores in urban areas of 100,000 people and over provided 72.59 per cent of the dollar volume of the food chains in that province.

Marked changes in total sales of chain food stores, and average sales per outlet are noticeable when these statistics are classified by size of locality groupings. The increase in dollar volume between 1930 and 1941 occurred principally in the two larger size-of-locality groups, with the greatest percentage gain in chain volume of 86.9 per cent experienced by the outlets situated in localities ranging between 30,000 and 100,000 people. These data are shown in the following table.

Sales of Food Chains Compared by Size of Locality
1930 and 1941

Size of locality	Dollar sales 1930	Dollar sales 1941	Increase	% Increase 1941/1930
	$	$	$	
Total, all localities	128,291,500 (1)	177,405,900	49,114,400	+ 38.2
100,000 and over	57,112,700	78,376,200	21,263,500	+ 37.2
30,000 to 99,999	16,352,100	30,572,700	14,220,600	+ 86.9
10,000 to 29,999	23,484,100	30,375,700	6,891,600	+ 29.3
1,000 to 9,999	24,805,800	28,977,500	4,171,100	+ 16.8
Under 1,000	6,536,800	9,103,800	2,567,000	+ 39.2

(1) Figure at variance with that shown in Table 1, which has been revised since 1930. This revision cannot be broken down by locality sizes.

Average sales per store in 1930 and 1941 and percentage changes between the two years are presented below by size-of-locality groups. The trend to larger average sales per chain unit is apparent for all size groups and is particularly outstanding for units of the food chains situated in centers with populations in excess of 10,000 people. While chain stores located in cities with populations between 10,000 and 30,000 had the largest average sales per unit, retail outlets situated in localities with populations between 30,000 and 100,000 people experienced the greatest percentage increase between the two census years. Average sales per store in all size-of-locality groups in 1930 were all fairly closely grouped around the Dominion average sales of $54,523 per store; in 1941, however, a wide gap is apparent between the average sales of stores situated in the three larger size-of-locality groups, and those found in centers with populations ranging up to 10,000 people.

Average Sales per Store of Chain Food Stores,
by size of Locality

Size of locality	1930	1941	% change 1941/1930
Total, all localities	54,523	103,928	+ 90.6
100,000 and over	55,128	115,770	+ 110.0
30,000 to 99,999	49,702	129,545	+ 160.6
10,000 to 29,999	70,312	140,628	+ 100.0
1,000 to 9,999	53,117	74,492	+ 40.2
Under 1,000	34,956	48,168	+ 37.8

Percentage of Food Store Sales Obtained by Food Chains

Since the sales of the food chains are concentrated in the larger urban centers, it is probable that the competitive situation can be shown more accurately by size-of-locality groups than by provinces and for the Dominion as a whole. The ratios of the sales of the food chains to the total sales of all grocery, combination, and meat and fish stores by size of locality for 1930 and 1941 are shown below. These percentages have been heavily influenced by the sales of chain outlets situated in the provinces of Ontario, Quebec, and British Columbia which together accounted for over four-fifths of all food chain sales in the two census years.

Food Chain Ratios, by Size of Locality, 1930 and 1941

(Percentages of chain to total sales for all food stores)

Size of locality	1930	1941
	%	%
Canada, Total	26.3	27.3
100,000 and over	30.8	34.0
30,000 - 99,999	28.3	36.7
10,000 - 29,999	31.1	32.0
Under 10,000	18.5	15.8

In general, the food chain stores increased their share of the total market in the groups of localities having populations in excess of 30,000 people, consolidated their position in centers with populations between 10,000 and 30,000 people, and actually lost ground in the size-of-locality group of under 10,000 population.

Proportion of Sales Increase Secured by Chain

Total sales of chain and independent grocery, combination and meat and fish market stores were all at higher levels in 1941 than in 1930 in all size-of-locality groups. The following table presents by size of locality a comparison of the increases in the sales of the food chains with the increases in the sales of all food stores between the two census years and shows the percentages of the increased volume which were obtained by the chains.

Sales Increases of Food Chains to Sales Gains of All Stores, by Size of Locality, 1941 over 1930

Size of locality	Increases in sales (All food stores)	Increases in sales (food chains)	Per cent of increase obtained by food chains
	$	$	%
CANADA, Total	162,133,500	49,114,400	30.3
100,000 and over	45,289,000	21,263,500	47.0
30,000 to 99,999	25,479,100	14,220,600	55.8
10,000 to 29,999	19,480,100	6,891,600	35.4
Under 10,000	71,885,300	6,738,700	9.4

On a Canada-wide basis nearly a third of the increase in sales volume between the two years was obtained by the food chains, but as will be observed, this ratio was by no means typical of the experiences of chain outlets in the different size-of-locality groups.

Age of Food Chain Outlets

The census questionnaire asked the various chain organizations to classify their stores in operation in 1941 according to their date of acquisition, using for this purpose broad date groupings rather than individual years. A few firms were unable to provide this information, either in whole or in part but dates of acquisition were secured for 1,659 of the 1,707 units of food chains operating in 1941 and are shown on a provincial basis in Table 7. The basis of classification was the date on which the individual units came under their present ownership at their locations on the census date. The data are therefore unaffected by any renovations without change of location made during the existence of many unit stores.

Of the 1,659 stores whose ages were reported, 96 or 5.8 per cent were opened some time during the census year; another 249 units or 15.0 per cent were opened in the three-year period between 1938 and 1940; 319 or 19.2 per cent between 1934 and 1937; 20.7 per cent of the total number were opened between 1930 and 1933; 36.5 per cent between 1920 and 1929; and only 46 units or 2.8 per cent of the total were opened in 1919 or earlier. On the basis of these figures, the average age of all the food chain units operating in 1941 may be estimated at approximately ten years.

The information available does not show the total number of openings or closings during the intercensal period nor does it provide a basis for computing the life expectancy of individual chain stores. Nevertheless, some interesting results may be derived from an examination of the age analyses for the two census periods.

In 1930, according to the first complete Census of Merchandising, there were 2,352[x] chain food stores in Canada. Of this number 134[x] could not be classified according to age, while another 336 units had been opened in 1930. There were thus 1,882 units in operation in 1930 which were opened in 1929 or in earlier years. A considerable portion of the unclassified 134 units could also be added to this category. But the analysis from the 1941 Census according to age shows that only 652 stores operating in 1941 were opened in 1929 or prior to that date. Thus

[x] Revised.

at least 1,230 stores or 65.3 per cent of the total number established prior to 1930 and operating in that year had been closed during the intercensal period.

This subject may be approached from another angle. There were 2,352 food chain stores in operation in 1930 according to the results of the 1930 Census. The analysis by age of the stores operating in 1941 shows 343 of these stores opened between 1930 and 1933. Assuming that perhaps one-quarter or about 80 of these 343 stores active in 1941 were opened in 1930 alone, it may be estimated that 263 of the stores operating in 1941 were opened between 1931 and 1933. According to Table 7 another 664 of the stores in operation in 1941 were opened between 1934 and 1941. There were thus at least 927 (263 + 664) additions to the food chain store field between 1931 and 1941, which, when added to the 2,352 stores in operation in 1930, yields a total of 3,279 which would be the number in operation in 1941 had there been no closures. But there were only 1,707 units in operation in 1941 so that closures must have numbered at least 1,572. Obviously this figure also understates the number of closures because no allowance is made here for the stores which both opened and closed during the intercensal period and, therefore, do not appear in the analysis of the results for either of the two years. Nevertheless, it is apparent that a major turnover in the number of stores used by the food chains occurred between the two Census periods.

On a provincial basis, the number of stores operated by the food chains increased between 1930 and 1941 from 244 to 280 units in British Columbia and from 67 to 95 outlets in Nova Scotia; decreases were largest in Ontario, Quebec, and Saskatchewan, the reduction amounting to 317 stores, 281 stores, and 54 stores for the respective provinces. By size-of-locality groups, decreases in numbers and percentage reductions between 1930 and 1941 are as follows: Over 100,000 population, 359 stores or 34.7 per cent; 30,000 to 99,999 population, 93 units or 28.2 per cent; 10,000 to 29,999 population; 118 outlets or 35.3 per cent; up to 10,000 population, 76 stores or 11.6 per cent.

Closures of stores were made by all three kinds of food chains during the intercensal period, the reductions in the number of stores operated amounting to 301 outlets for the grocery chains, 286 units for the combination chains, and 59 stores for the meat and fish market chains. Combination chains increased the number of active combination units from 698 outlets in 1930 to 762 in 1941, and reduced the number of grocery stores from 665 to 323 outlets between the two years.

It is probable that the more recently opened outlets of the food chains were located and equipped to provide substantially larger individual store sales than the average sales per store prevailing earlier. Thus, calculations from the figures contained in Table 4 reveal that average sales per unit, including all three kinds of chain stores, increased from $44,000 in 1934 to $53,000 in 1937 and to $104,000 in 1941, a percentage increase of almost 100 per cent between the two latter years. In addition, the number of stores with sales volumes of $100,000 and over increased from 225 in 1937 to 529 in 1941, a gain of 304 units which compares with the 345 outlets established in the years 1938 to 1941 inclusive.

Credit Sales

Credit sales made by the food chains in 1941 are shown in Table 2. These sales have been estimated from the percentage ratios of credit to total sales which the firms reported in their Census schedules. Of the 79 food chains in operation in 1941, 62 firms having total sales of $106,140,400 reported credit sales estimated at $11,628,200, or 10.9 per cent of the total net sales of such organizations. Since sales at wholesale comprised a minor part of the total dollar volume, the credit sales of the food chains were made principally to their retail customers. Overall, only a slight increase in the ratios of total credit

to total sales has occurred between 1930 and 1941, the percentages being 4 per cent and 6 per cent respectively.

Employment in Food Chain Stores

According to the data contained in Table 2, the retail outlets of the food chains furnished employment in 1941 to 9,613 full-time store employees, of which slightly over 7,000 were male workers. Part-time store employees of these chain stores numbered 5,102 workers in 1941, of which about 4,300 were male. Salaries and wages distributed to full-time store employees in 1941 amounted to over $9,900,000, and slightly over $1,200,000 was paid to part-time store employees.

Sales per full-time store employee as a measure of the productivity of such workers is affected by the presence of a number of va iables in operating conditions. Thus, retail sales are a composite of such factors as the number of transactions, prices, and total quantities of foodstuffs handled. Distribution of store volume between packaged and bulk commodities has certain relationships to the total number of employees required. In addition, the types of stores operated by the different chains, whether service or self-service, combination or grocery, the presence or absence of credit and delivery services, and the factor of working proprietors in the smaller chains have unmeasureable influences on the selling results of chain store employees.

Average sales per full-time store employee of the different kinds of food chains in 1941 are as follows:

All food chains	$ 18,500
Grocery chains	$ 14,600
Combination chains	$ 20,000
Meat and fish market chains	$ 9,900

Truer ratios of sales to store employees would be obtained by classifying sales and store employees by kinds of stores rather than by kinds of chains and then breaking down the resulting data between service and self-service stores. Unfortunately, however, the necessary statistics are not immediately available for such purposes.

Commodities Sold by Food Chains

Commodities sold by grocery, combination, and meat and fish market chains in 1941 are presented in Tables 8, 9 and 10. These data have been compiled from the reports of those food chains which were able to provide breakdowns of the commodity sales of their entire organizations, irrespective of the kinds of stores operated.

Since a number of the chains classified in this report as one kind of business operate other kinds-of-food stores in minor numbers, the percentage distributions of commodity sales shown in these tables are not typical commodity compositions of individual grocery, combination, or meat and fish market chain outlets. For example, Table 9 reveals that sales of fresh and cooked meats including poultry and fish comprised 18.97 per cent of the sales of the combination chains whose sales were classifiable by commodities. Sales of the grocery units of the combinations, which do not include sales of fresh meats, however, comprised about 13 per cent of the total dollar volume of these firms in 1941. The percentage of meats, poultry and fish sold by the combination units of these companies would, therefore, be somewhat larger than the 18.97 per cent mentioned above.

The commodity coverage, or the percentage of the total sales made by the food chains which was also reported by groups of commodities was comparatively high. Thus, 74.83 per cent of the sales of the grocery chains, 97.74 per cent of the sales of the combination chains, and 96.44 per cent of the sales of the meat and fish market chains were analyzed by commodities.

Expenses of the Food Chains

Operating expenses of grocery, combination and meat and fish market chains in 1941 are shown in Table 2. This table summarizes data on sales, store employment and payroll, chain expenses, rentals, inventories and credit sales for all chains and for each of the three kinds of business. Tables 11, 12 and 13 present similar statistics for grocery, combination, and meat and fish market chains, classified by size of business.

Expense data are shown in these tables as dollar totals and as percentage ratios of these expenses to the total sales of the chains comprising the different groups. The expense percentages are therefore weighted averages or, in other words, these ratios are directly and proportionately influenced by the varying sizes of the different organizations included in the various classifications. As a result, one or several important chains operating under conditions not typical of food chains as a whole may exert influences on the average percentage relationships shown in these tables not proportional to the numerical importance of such organizations.

The reporting schedules used in the Census of Merchandising in obtaining data from the food chains for 1941 provided statistics on store expenses, overhead expenses, and warehouse expenses. Store expenses were shown under wage cost, rentals paid, and other store expenses excluding rentals. No breakdowns of overhead expenses or of warehouse expenses, however, were required by the schedules.

The functional breakdown of expenses between store, overhead, and warehouse expenses, may have been at variance with the head office accounting records of some food chains which may group their expense items by natural divisions, irrespective of the sources of these operating costs. Under the latter method of classifying expenses, figures for such items as salaries and wages, depreciation, heat, light and power, for example, would be developed for the entire organization rather than for its administrative and different operating divisions. Such chains would, therefore, find it necessary to pro-rate their expenses by various methods to the three major expense classifications used in the Bureau's schedules.

A third qualification necessary to the interpretation of these expense ratios arises from variations between chains in respect to the presence or absence of central warehouses. Differing policies of procuring and distributing merchandise to the store outlets must also be considered. Thus, at least some of those chains operating relatively few retail outlets with fairly small individual store volumes may have relied upon wholesalers to service these units; conversely, some chains with comparatively few outlets having large store volumes may have supplied these stores through drop shipments direct from manufacturers to the individual chain units. Likewise, the large food chains may have used the technique of drop shipments to supplement their warehouse facilities or to service those stores which are located some distance from the central warehouses. Since total sales of the food chains apply to those with and without central warehouses, while warehouse expenses are confined to only those firms operating warehouses, the ratios of warehouse expenses to total sales may in some instances understate the expense experiences of some of those chains with central warehouses.

Grocery Chain Operating Expenses

Total operating expenses of the grocery chains in 1941 are presented in Table 11. Columns 2 and 3 of this table present the operating statistics of those chains operating less than 25 units in 1941, and of those firms which operated 25 or more units. Columns 4 and 5 present similar data for the grocery chains classified between those which operate only grocery stores and those with grocery and other kinds of stores. Most of the other stores consisted of combination food units, although a few miscellaneous kinds of business are included.

It is probable that those chains which in 1941 operated combination stores as a minor proportion of their total retail outlets appear in the classifications principally among those firms which operated less than 25 units in 1941, as well as among those chains which operated both grocery and other stores. Average store sales for chains with less than 25 units in 1941 amounted to $75,801 and for chains operating both grocery and combination stores, average sales amounted to $85,655 per retail outlet. Average sales for both of these classifications were substantially in excess both of those chains with 25 units or more, and of those firms operating straight grocery stores.

Total operating expenses of all grocery chains in 1941 averaged 13.84 per cent of total sales. Considerable variations in the expense experiences of these chains are apparent, however, when the grocery chains are first classified by numbers of units operated, and then classified between those which operated grocery stores only and those with both grocery and other kinds of stores. Thus, 23 grocery chains operating less than 25 units per firm in 1941 and with average sales of $75,800 per store, obtained an overall expense ratio of 12.65 per cent of total sales; the remaining 5 chains, operating 25 or more units with average store volume of $44,294, however, realized a total expense ratio of 15.69 per cent of total sales. When these grocery chains were classified according to kinds of stores operated, the 12 chains operating 164 grocery and other kinds of units (principally combination food outlets) with average store volume of $85,655, obtained a total expense ratio of 13.03 per cent of sales, while the firms operating only grocery stores with about half of the average store volume of the former group had total expenses averaging the higher figure of 14.75 per cent of sales.

Total store expenses amounted to 11.30 per cent of sales for those chains operating less than 25 units and this compares with a store expense ratio of 13.13 per cent of sales for those firms which operated 25 units or more in 1941. Store wages, rentals paid on leased premises and other store expenses varied similarly. Overhead expenses, reflecting the smaller average number of stores operated per chain, were lower for those firms with less than 25 units than for those grocery chains which maintained 25 or more retail outlets in 1941. Warehouse expense ratios were likewise lower for the first group of chains than for those operating 25 units or more but this may be due to the operation of fewer central warehouses by the smaller grocery chains. Indeed average sales per firm averaged about $700,000 for the smaller group of grocery chains as compared with average sales of $2,104,000 for the larger grocery chains.

Although the average sales per store of those chains operating both grocery and other kinds of stores were nearly twice the average sales per unit of the chains operating only grocery units, the total store expense ratio of the former group was only slightly below that of the straight grocery store chains. Reflecting in part the higher store volumes, both store wage cost and rentals

paid on store premises as percentages of sales were less in the case of the firms operating both grocery and other stores than for those operating only grocery store outlets. On the other hand, other store expenses excluding rentals amounted to 4.6 per cent for the chains with both grocery and other stores and only 3.6 per cent for the straight grocery chains.

Overhead expenses averaged 0.45 per cent of total sales in 1941 for the chains operating both grocery and other units, considerably lower than the 1.54 per cent of sales experienced by the straight grocery chains. This difference apparently was due to the fewer grocery and other stores operated by the average chains in this classification, the straight grocery chains maintaining on the average a somewhat larger number of stores. Warehouse expenses as a percentage of total sales also averaged lower for the firms with both grocery and other retail outlets, reflecting in part the operation of fewer central warehouses by these chains.

Combination Chains Operating Expenses

Total operating expenses of the 34 combination food chains, as presented in Table 2, averaged 13.48 per cent of total sales in 1941, while store expenses, overhead, and warehouse expenses amounted to 10.94 per cent, 1.40 per cent, and 1.14 per cent of total sales. These ratios, however, are by no means uniform when the combination chains are classified by number of units operated. Thus, the 28 combination chains with less than 25 units operated 181 stores, or an average of about 7 outlets to the chain, experienced average sales of about $84,400 per unit, and obtained a total operating expense ratio of 15.56 per cent of sales. The remaining 6 combination chains were definitely larger, operating an average of 152 outlets per chain with average sales of $144,700 per store, and these chains achieved the lower total expense ratio of 13.24 per cent of sales.

The fact that the 6 larger combination chains obtained a considerably lower total expense ratio than the 28 smaller combination chains is caused by more favourable expense experiences in the operation of the retail outlets. Thus, store wage cost amounted to 5.73 per cent for the larger chains and 7.92 per cent of total sales for the smaller organizations; rentals paid on leased store premises were 1.21 per cent of sales for the larger and 1.66 per cent for the smaller chains; and other store expenses exclusive of rentals paid averaged 3.68 per cent of total sales for the larger and 5.46 per cent for the smaller combinations. The fact that the average store volumes of the 6 larger combinations in 1941 substantially exceeded the average store sales of the smaller chains bears a significant relationship to these comparisons.

The smaller combination chains, however, obtained decidedly lower overhead and warehouse expense ratios in 1941 than the six larger combinations. Overhead expenses, as a percentage of sales, would naturally tend to be lower for the smaller chains which operated on the average about 7 stores per firm than for the larger organizations operating an average of 152 outlets per chain in 1941. Probably relatively fewer central warehouses were operated by the small firms than by the large chains in that year. Since total warehouse expenses were expressed as percentages of total sales to obtain the warehouse expense ratios shown in this table, the warehouse expense percentages for the small chains is weighted downward by the fact that total sales for these firms includes the dollar volume of a number of small chains which reported no warehouse expenses.

Operating Expenses of Meat and Fish Market Chains

Operating expenses of all meat and fish market chains in 1941 are presented in Table 13, accompanied by analyses of these expenses for those chains having less than 15 units and those operating 15 or more stores.

Total operating expenses for all meat and fish market chains averaged 21.37 per cent of sales in 1941. Those chains with less than 15 units, averaging about 6 units to the chain and with average sales of $41,861 per outlet, obtained a total expense ratio of 19.40 per cent of sales. On the other hand, the 3 companies operating 15 or more stores in 1941, an average of about 28 stores to the chain, had average sales of $19,446 per unit and experienced a total operating expense ratio of the larger figure of 25.60 per cent.

The variation in total store expense ratios between the two size groups was principally responsible for the difference between the total expense percentages of the two classifications of chains. Reflecting the larger average store volume of the 14 organizations with less than 15 units, store expenses averaged 18.42 per cent of sales for these meat and fish market chains compared with 23.23 per cent of sales for the chains with 15 or more outlets. Wage cost, rentals paid on leased premises, and other store expenses varied in a similar manner.

Overhead expenses were also lower for the chains operating less than 15 units than for those with the larger number of stores. Warehouse expenses were very low for the firms with less than 15 units in 1941, and apparently only a few central warehouses were operated by the chains in this classification. No warehouse expenses were reported by the 3 chains which each operated 15 or more outlets in 1941.

Middle Range Figures

The expense ratios shown in Tables 2, 11, 12 and 13, were obtained by totalling the expenses reported by each chain and expressing the totals as percentages of the total sales of these companies. These percentages are therefore weighted averages in that the experiences of the larger companies exert proportionately greater influences upon the ratios than those of the smaller firms. Other averages developed in this report are weighted proportionately by the same factors. These averages, while presenting the overall positions of the different groups of food chains and the composite results of all food chains, may be influenced by special circumstances relating to several of the larger chain companies. In such cases, the averages would not represent the typical experiences of the majority of the chain organizations.

To overcome these difficulties, "middle range" figures were developed for total sales of the different chains, average sales per store, average salary per full-time store employee, average yearly retail sales per full-time store employee, and for the various operating expenses of the three kinds of food chains. To compute these "middle range" figures, the above items were calculated for each company, the various expenses for each chain being expressed as percentages of the sales of that firm. Each set of ratios was then arranged in ascending order of magnitude independently of the other ratios. The figures were than divided into three ranges: the lower range consisting of the lower 25 per cent of the number of ratios; the upper range consisting of the upper 25 per cent of the number of ratios; and the middle range containing the remaining half of the figures. Both the lower and the upper quarters of the

arrays of the different ratios were then discarded. Thus, after omitting the extremely high and extremely low values contained in the first and fourth quarters of the items, the remaining items were given equal weight in obtaining ratios on operating results.

The "Lower Limit of the Middle Range" and the "Upper Limit of the Middle Range" are the two values at either end of the middle groups of ratios. The "Median" is the value found midway between the upper and lower limits of the middle range. Thus the lower limit of the middle range for the total expenses of grocery chains is shown in Table 14 at 13.3 per cent of total sales, the upper limit at 16.7 per cent, and the median at 14.6 per cent of total sales. One-quarter of all grocery chain firms therefore obtained total chain operating expenses of less than 13.3 per cent of total sales; one-quarter of the firms had total expense ratios of more than 16.7 per cent of total sales, while the average total expense ratio of the intermediate half of these firms amounted to 14.6 per cent of total sales. The same explanation, of course, may be made for other items in this table.

In interpreting the middle range figures, each item must be considered independently, as neither all the high nor all the low figures came from the same reports; that is to say, the ratios in any column in the middle range table cannot be related to other ratios in the same column. To illustrate, the upper limit of the middle range for average sales per store of combination chains was $111,700, and the similar figure for total store expenses was 17.0 per cent of total sales. Obviously, these values cannot be related since chains with high average sales per unit usually have comparatively low store expense ratios.

Reference was made earlier to the fact that the percentages found in Tables 2, 11, 12 and 13 were weighted averages in that they reflected the influences of the larger chains. Comparisons of the ratios in these tables with those contained in Table 14 will illustrate these differences. Thus, total operating expenses of grocery chains according to Tables 2 and 11 amounted to 13.84 per cent of total sales. The middle range for this item as shown in Table 14, however, extended between 13.3 and 16.7 per cent of total sales; the median standing at 14.6 per cent of total sales.

Table 1.--Food Chains, Grocery Combination and Meat Market Chains

(Number of chains, chain stores, chain sales and total sales, 1930 and 1941)

	1930	1941	% change in sales 1941/1930
CANADA--			
No. of chains	87	79	
No. of stores (maximum)	2,352	1,707	
Chain sales	$127,582,500	$177,405,900	+ 39.1
Total sales	$488,429,600	$647,442,900	+ 32.6
% chain sales to total	26.1	27.4	
Average sales per chain store	$ 54,244	$ 103,928	+ 91.6
British Columbia(1) --			
No. of chains	19	14	
No. of stores (maximum)	246	282	
Chain sales	$ 10,194,900	$ 18,765,300	+ 84.1
Total sales	$ 37,425,600	$ 54,646,300	+ 46.0
% chain sales to total	27.2	34.3	
Average sales per chain store	$ 41,443	$ 66,544	+ 60.6
Alberta --			
No. of chains	8	8	
No. of stores (maximum)	120	103	
Chain sales	$ 5,587,000	$ 7,932,100	+ 42.0
Total sales	$ 23,469,400	$ 30,521,800	+ 30.0
% chain sales to total	23.8	26.0	
Average sales per chain store	$ 46,558	$ 77,011	+ 65.4
Saskatchewan --			
No. of chains	10	4	
No. of stores (maximum)	165	111	
Chain sales	$ 6,969,300	$ 6,794,100	- 2.5
Total sales	$ 21,690,500	$ 22,955,000	+ 5.8
% chain sales to total	32.1	29.6	
Average sales per chain store	$ 42,238	$ 61,208	+ 44.9
Manitoba --			
No. of chains	8	4	
No. of stores (maximum)	121	85	
Chain sales	$ 5,689,100	$ 8,247,500	+ 45.0
Total sales	$ 22,225,200	$ 28,786,800	+ 29.5
% chain sales to total	25.6	28.7	
Average sales per chain store	$ 47,017	97,029	+106.4
Ontario --			
No. of chains	37	41	
No. of stores (maximum)	1,107	790	
Chain sales	$ 70,769,300	$ 99,318,600	+ 40.3
Total sales	$206,749,300	$261,988,000	+ 26.7
% chain sales to total	34.2	37.9	
Average sales per chain store	$ 63,929	$ 125,720	+ 96.7
Quebec --			
No. of chains	13	7	
No. of stores (maximum)	495	214	
Chain sales	$ 23,708,400	$ 28,477,200	+ 20.1
Total sales	$140,527,500	$190,004,000	+ 35.2
% chain sales to total	16.9	15.0	
Average sales per chain store	$ 47,896	$ 133,071	+177.8

(1) Includes Yukon and Northwest Territories.

Table 1.--Food Chains, Grocery Combination and Meat Market Chains--(Concl'd)

(Number of chains, chain stores, chain sales and total sales, 1930 and 1941)

	1930	1941	% change in sales 1941/1930
Maritime Provinces --			
No. of chains	12	17	
No. of stores (maximum)	98	122	
Chain sales	$ 4,664,500	$ 7,871,100	+ 68.7
Total sales	$ 36,342,100	$ 58,541,000	+ 61.1
% chain sales to total	12.8	13.4	
Average sales per chain store	$ 47,596	$ 64,517	+ 35.6

Table 2.--Food Chains--Principal Statistics, Grocery, Combination and Meat and Fish Market Chains, 1941

	All Chains	Grocery store chains	Combination store chains	Meat and fish market chains
A. Number of chains	79	28	34	17
B. Number of stores	1,707	448	1,093	166
C. Sales --				
1. Retail sales through stores	$177,405,900	26,523,300	145,794,100	5,088,500
2. Wholesale sales to other firms	$ 1,725,000	153,700	1,571,300	-
3. Total chain sales	$179,130,900	26,677,000	147,365,400	5,088,500
D. Store employment and payroll --				
Full-time employees --				
1. Male employees, number	7,020	1,262	5,277	481
2. Female employees, number	2,593	553	2,007	33
3. Salaries and wages	$ 9,934,200	1,584,600	7,820,600	529,000
Part-time employees --				
1. Male employees, number	4,326	696	3,414	216
2. Female employees, number	776	181	586	9
3. Salaries and wages	$ 1,222,200	199,200	961,100	61,900
E. Chain expenses --				
Store expenses --				
1. Wage cost Amount	$ 11,156,400	1,783,800	8,781,700	590,900
2. Per cent of total sales	6.23	6.69	5.96	11.61
3. Other expenses -- including rent Amount	$ 9,192,100	1,422,900	7,345,100	424,100
4. Per cent of total sales	5.13	5.33	4.98	8.34
5. Total store expenses Amount	$ 20,348,500	3,206,700	16,126,800	1,015,000
6. Per cent of total sales	11.36	12.02	10.94	19.95
Overhead expenses Amount	$ 2,393,600	256,400	2,068,000	69,200
Per cent of total sales	1.33	0.96	1.40	1.36
Warehouse expenses Amount	$ 1,910,500	230,300	1,677,100	3,100
Per cent of total sales	1.07	0.86	1.14	0.06
Total chain expenses Amount	$ 24,652,600	3,693,400	19,871,900	1,087,300
Per cent of total sales	13.76	13.84	13.48	21.37

Table 2.--Food Chains--Principal Statistics, Grocery, Combination and Meat and Fish Market Chains, 1941--(Concl'd)

	All Chains	Grocery store chains	Combination store chains	Meat and fish market chains
F. Rentals --				
1. Number of stores in leased premises	1,547	429	989	129
2. Sales of stores in leased premises	$157,824,400	22,498,500	131,121,000	4,204,900
3. Rentals paid Amount	$ 2,072,000	326,200	1,641,900	103,900
4. Per cent of sales in leased premises	1.31	1.45	1.25	2.47
G. Inventories, end of 1941 --				
1. Store inventories	$ 7,386,800	1,831,600	5,439,200	116,000
2. Warehouse inventories	$ 5,758,900	1,290,700	4,465,000	3,200
3. Total inventories	$ 13,145,700	3,122,300	9,904,200	119,200
H. Customers' accounts outstanding	$ 1,088,000	375,500	560,900	151,600
Per cent of total sales	0.61	1.41	0.38	2.98
I. Credit Sales --				
1. Number of chains reporting credit sales	62	21	28	13
2. Total net sales of such chains	$106,140,400	19,552,800	82,596,600	3,991,000
3. Net credit sales of such chains	$ 11,628,200	3,409,600	7,371,100	847,500
4. Ratio of credit sales to total sales	10.96	17.44	8.92	21.24
J. Cash Sales --				
Number of chains reporting they sell only for cash	17	7	6	4
Total net sales of such chains	$ 73,086,900	7,220,600	64,768,800	1,097,500

Table 3.--GROCERY AND COMBINATION CHAINS--Kinds of Stores Operated for Chains Classified by Size, 1941

	Number of Chains	TOTAL UNITS		GROCERY UNITS		COMBINATION UNITS		OTHER	
		Number	Sales	Number	Sales	Number	Sales	Number	Sales
GROCERY STORE CHAINS--									
Total, all chains ..	28	448	26,523,300	412	20,958,800	22	5,313,800	14	250,700
Chains having:									
Less than 10 units	17	94	4,906,600	83	3,966,700	7	864,500	4	75,400
10-99 units	11	354	21,616,700	329	16,992,100	15	4,449,300	10	175,300
More than 100 units	-	-	-	-	-	-	-	-	-
COMBINATION STORE CHAINS --									
Total, all chains ..	34	1,093	145,794,100	323	18,977,400	762	126,509,700	8	307,000
Chains having:									
Less than 10 units	27	162	14,345,300	31	1,562,900	123	12,475,400	8	307,000
10-99 units	3	144	9,477,000	42	2,317,500	102	7,159,500	-	-
More than 100 units	4	787	121,971,800	250	15,097,000	537	106,874,800	-	-

Table 4.--FOOD CHAINS--Units Classified According to Amount of Annual Sales

(Grocery, meat and combination store chains combined)

	1934				1937			
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent
		$				$		
CANADA, Total	2,395	104,912,800	100.00		2,287	121,054,800	100.00	
$1,000,000, and over	-	-	-	-	-	-	-	-
$500,000 - $999,999	-	-	-	-	-	-	-	-
$300,000 - $499,999	1	302,700	0.29	0.29	14	4,959,800	4.10	4.10
$200,000 - $299,999	24	5,639,700	5.38	5.67	54	12,874,600	10.64	14.74
$100,000 - $199,999	127	16,843,900	16.06	21.73	157	21.721,100	17.94	32.68
$ 50,000 - $ 99,999	566	38,138,600	36.35	58.08	612	41,514,500	34.29	66.97
$ 30,000 - $ 49,999	594	23,164,600	22.08	80.16	625	24,408,900	20.16	87.13
$ 20,000 - $ 29,999	543	13,529,700	12.90	93.06	414	10.268,700	8.48	95.61
$ 10,000 - $ 19,999	413	6,631,300	6.32	99.38	289	4,584,000	3.79	99.40
$ 5,000 - $ 9,999	69	506,800	0.48	99.86	73	570,600	0.47	99.87
Less than $ 5,000	58	155,500	0.14	100.00	49	152,600	0.13	100.00

	1941			
	Number	Sales	Per cent of total	Cumulative per cent
		$		
CANADA, Total	1,707	177,405,900	100.00	
$1,000,000, and over	-	-	-	-
$500,000 - $999,999	38	23,203,400	13.08	13.08
$300,000 - $499,999	110	42,868,000	24.16	37.24
$200,000 - $299,999	100	24,292,400	13.69	50.93
$100,000 - $199,999	281	39,456,800	22.24	73.17
$ 50,000 - $ 99,999	351	24,445,400	13.78	86.95
$ 30,000 - $ 49,999	395	15,448,000	8.71	95.66
$ 20,000 - $ 29,999	202	5,076,800	2.86	98.52
$ 10,000 - $ 19,999	144	2,156,000	1.22	99.74
$ 5,000 - $ 9,999	48	352,700	0.20	99.94
Less than $ 5,000	38	106,400	0.06	100.00

Table 5.--Food Stores Classified by Size of Business and by Type of Operation

(Grocery, meat and combination stores)

	TOTAL					
	Stores			Sales		
	Number	Per cent of total	Cumulative per cent	Amount	Per cent of total	Cumulative per cent
				$		
CANADA, Total	32,523	100.0		647,442,900	100.0	
$1,000,000, and over ...	-	-	-	-	-	-
$500,000 - $999,999	43	0.1	0.1	26,459,000	4.1	4.1
$300,000 - $499,999 ...) $200,000 - $299,999 ...)	250	0.8	0.9	78,199,300	12.1	16.2
$100,000 - $199,999	536	1.6	2.5	72,593,400	11.2	27.4
$ 50,000 - $ 99,999	1,631	5.0	7.5	109,081,800	16.8	44.2
$ 30,000 - $ 49,999	2,970	9.1	16.6	112,949,300	17.4	61.6
$ 20,000 - $ 29,999	3,506	10.8	27.4	84,712,700	13.1	74.7
$ 10,000 - $ 19,999	6,608	20.3	47.7	93,528,700	14.4	89.1
$ 5,000 - $ 9,999	6,318	19.5	67.2	45,186,300	7.0	96.1
Less than $ 5,000	10,661	32.8	100.0	24,732,400	3.9	100.0
	Chains					
				$		
CANADA, Total	1,707	100.0		177,405,900	100.0	
$1,000,000, and over ...	-	-	-	-	-	-
$500,000 - $999,999	38	2.2	2.2	23,203,400	13.1	13.1
$300,000 - $499,999	110	6.5	8.7	42,868,000	24.1	37.2
$200,000 - $299,999	100	5.9	14.6	24,292,400	13.7	50.9
$100,000 - $199,999	281	16.5	31.1	39,456,800	22.2	73.1
$ 50,000 - $ 99,999	351	20.6	51.7	24,445,400	13.8	86.9
$ 30,000 - $ 49,999	395	23.1	74.8	15,448,000	8.7	95.6
$ 20,000 - $ 29,999	202	11.8	86.6	5,076,800	2.9	98.5
$ 10,000 - $ 19,999	144	8.4	95.0	2,156,000	1.2	99.7
$ 5,000 - $ 9,999	48	2.8	97.8	352,700	0.2	99.9
Less than $ 5,000	38	2.2	100.0	106,400	0.1	100.0
	Independents					
				$		
CANADA, Total	30,816	100.0		470,037,000	100.0	
$1,000,000, and over ...	-	-	-	-	-	-
$500,000 - $999,999	5	-	-	3,255,600	0.7	0.7
$300,000 - $499,999 ...) $200,000 - $299,999 ...)	40	0.1	0.1	11,038,900	2.4	3.1
$100,000 - $199,999	255	0.8	0.9	33,136,600	7.1	10.2
$ 50,000 - $ 99,999	1,280	4.2	5.1	84,636,400	18.0	28.2
$ 30,000 - $ 49,999	2,575	8.4	13.5	97,501,300	20.8	49.0
$ 20,000 - $ 29,999	3,304	10.7	24.2	79,635,900	16.9	65.9
$ 10,000 - $ 19,999	6,464	21.0	45.2	91,372,700	19.4	85.3
$ 5,000 - $ 9,999	6,270	20.3	65.5	44,833,600	9.5	94.8
Less than $ 5,000	10,623	34.5	100.0	24,626,000	5.2	100.0

Table 6.--FOOD CHAINS--Stores and Sales Classified by Provinces and Size of Locality, 1941

An (x) indicates that figures are withheld to avoid disclosing individual operations.

Province	All Localities			Stores and sales in places with population of --					
				Over 100,000			30,000 - 100,000		
	No. of Stores	Total Chain Sales Value	Total Chain Sales %	No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales
		$			$			$	
CANADA, Total	1,707	177,405,900	100.00	677	78,376,200	44.18	236	30,572,700	17.23
Yukon and Northwest Territories	2	(x)	100.00	-	-	-	-	-	-
British Columbia	280	(x)	100.00	141	9,641,100	51.68	12	1,820,800	9.76
Alberta	103	7,932,000	100.00	-	-	-	61	5,278,400	66.54
Saskatchewan	111	6,794,200	100.00	-	-	-	38	3,283,200	48.33
Manitoba	85	8,247,300	100.00	66	5,987,100	72.59	-	-	-
Ontario	790	99,318,900	100.00	355	46,280,500	46.60	63	11,905,400	11.99
Quebec	214	28,477,200	100.00	115	16,467,500	57.83	31	5,562,300	19.53
New Brunswick	26	(x)	100.00	-	-	-	8	764,900	47.83
Nova Scotia	95	6,163,000	100.00	-	-	-	23	1,957,700	31.76
Prince Edward Island	1	(x)	100.00	-	-	-	-	-	-

Province	Stores and sales in places with population of --								
	10,000 to 30,000			1,000 to 10,000			Less than 1,000		
	No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales
		$			$			$	
CANADA, Total	216	30,375,700	17.12	389	28,977,500	16.33	189	9,103,800	5.13
Yukon and Northwest Territories	-	-	-	-	-	-	2	(x)	(x)
British Columbia	20	(x)	(x)	53	3,380,400	18.12	54	(x)	(x)
Alberta	5	1,003,200	12.65	18	1,051,600	13.26	19	598,800	7.55
Saskatchewan	13	1,134,500	16.70	25	1,739,700	25.60	35	636,800	9.37
Manitoba	5	853,900	10.35	7	730,600	8.86	7	675,700	8.12
Ontario	114	19,985,100	20.12	200	16,701,000	16.81	58	4,446,900	4.48
Quebec	29	3,353,400	11.78	39	3,094,000	10.86	-	-	-
New Brunswick	4	(x)	(x)	9	419,100	26.20	5	(x)	(x)
Nova Scotia	25	1,997,000	32.41	38	1,861,100	30.20	9	347,200	5.63
Prince Edward Island	1	(x)	(x)	-	-	-	-	-	-

Table 7.--Food Chains--Chain Units Classified by Provinces and Date of Establishment

		CANADA Total	Yukon and Northwest Territories	British Columbia	Alberta	Sask-atchewan	Manitoba	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island
TOTAL UNITS--Number		1,707	2	280	103	111	85	790	214	26	95	1
Units not classified as to date of establishment -- Number		48	-	-	-	-	-	27	13	-	8	-
Units classified as to date of establishment -- Number		1,659	2	280	103	111	85	763	201	26	87	1
Per cent		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1941-	Number	96	-	43	2	4	4	23	15	1	4	-
	% of total classified ...	5.8	-	15.4	1.9	3.6	4.7	3.0	7.5	3.8	4.6	-
1938-1940	Number	249	-	49	10	13	11	122	26	4	14	-
	% of total classified ...	15.0	-	17.5	9.7	11.7	12.9	16.0	12.9	15.4	16.1	-
1934-1937	Number	319	-	50	18	17	9	87	112	10	15	1
	% of total classified ...	19.2	-	17.9	17.5	15.3	10.6	11.4	55.7	38.5	17.2	100.0
1930-1933	Number	343	-	88	25	23	16	129	29	9	24	-
	% of total classified ...	20.7	-	31.4	24.3	20.7	18.8	16.9	14.4	34.6	27.6	-
1920-1929	Number	606	2	47	39	51	45	374	19	2	27	-
	% of total classified ...	36.5	100.0	16.8	37.9	46.0	53.0	49.0	9.5	7.7	31.0	-
Before 1920	Number	46	-	3	9	3	-	28	-	-	3	-
	% of total classified ...	2.8	-	1.0	8.7	2.7	-	3.7	-	-	3.5	-

Table 8.--Grocery Store Chains--Sales by Commodities, 1941

	$	%
Total retail sales, grocery chains	26,523,300	100.00
Less amount not classified by commodities	6,675,200	25.17
Sales analyzed by commodities	19,848,100	74.83

Analysis of Sales Classified by Commodities

Commodity	Item Totals		Group Totals	
	$	%	$	%
Total sales classified	-	-	19,848,100	100.00
Food and Kindred Products, Total	-	-	18,000,100	90.69
Bakery products, fresh	488,800	2.46	-	-
Candy and confectionery	207,600	1.05	-	-
Fresh fruits and vegetables	3,332,900	16.79	-	-
Fresh and cooked meats (including poultry and fish) except canned goods	1,180,500	5.95	-	-
Dairy products and eggs (including butter, cheese, fluid milk and cream and eggs)	2,222,000	11.20	-	-
All other food products such as tea, coffee, sugar, flour, canned goods of all kinds, etc., etc. (including bottled beverages and ice cream other than that sold with meals or in soda fountain)	10,568,300	53.24	-	-
Cigars, cigarettes, tobacco	-	-	339,500	1.71
Household Supplies, Total	-	-	1,421,600	7.16
Soaps, (laundry and toilet) and cleaning compounds	955,300	4.81	-	-
Other household supplies such as brooms, brushes, floor wax, toilet paper, kitchen utensils and cutlery, oil lamps and oil, ladders, etc.	466,300	2.35	-	-
All Other Merchandise, Total	-	-	86,900	0.44

Table 9.--Combination Store Chains--Sales by Commodities, 1941

	$	%
Total retail sales, combination chains	145,794,100	100.00
Less amount not classified by commodities	3,290,600	2.26
Sales analyzed by commodities	142,503,500	97.74

Analysis of Sales Classified by Commodities

Commodity	Item Totals $	Item Totals %	Group Totals $	Group Totals %
Total sales classified	-	-	142,503,500	100.00
Food and Kindred Products, Total	-	-	129,725,000	91.03
Bakery products, fresh	2,971,900	2.08	-	-
Candy and confectionery	1,456,800	1.02	-	-
Fresh fruits and vegetables	19,204,100	13.48	-	-
Fresh and cooked meats (including poultry and fish, except canned goods	27,032,300	18.97	-	-
Dairy products and eggs (including butter, cheese, fluid milk and cream and eggs)	16,367,500	11.49	-	-
All other food products such as tea, coffee, sugar, flour canned goods of all kinds, etc., etc. (including bottled beverages and ice cream other than that sold with meals or in soda fountain)	62,692,400	43.99	-	-
Sales of Beer and Wine (Quebec Province)	-	-	(x)	(x)
Receipts from Sale of Meals and Lunches (including soda fountain sales)	-	-	(x)	(x)
Cigars, Cigarettes, Tobacco	-	-	1,212,300	0.85
Household Supplies, Total	-	-	10,900,000	7.65
Soaps, (laundry and toilet) and cleaning compounds	7,578,400	5.32	-	-
Other household supplies such as brooms, brushes, floor wax, toilet paper, kitchen utensils and cutlery, oil lamps and oil, ladders, etc.	3,321,600	2.33	-	-
All Other Merchandise, Total	-	-	639,200	0.44

(x) Indicates that figures are withheld to avoid disclosing individual operations.

Table 10.--Meat and Fish Market Chains--Sales by Commodities, 1941

	$	%
Total retail sales, meat and fish market chains	5,088,500	100.00
Less amount not classified by commodities	181,200	3.56
Sales analyzed by commodities	4,907,300	96.44

Analysis of Sales Classified by Commodities

Commodity	Item Totals $	Item Totals %	Group Totals $	Group Totals %
Total sales classified	-	-	4,907,300	100.00
Food and Kindred Products, Total	-	-	4,899,000	99.83
Fresh fruits and vegetables	37,600	0.77	-	-
Fresh and cooked meats (including poultry and fish) except canned goods	4,232,500	86.25	-	-
Dairy products and eggs (including butter, cheese, fluid milk and cream and eggs)	403,000	8.21	-	-
All other food products such as tea, coffee, sugar, flour, canned goods of all kinds, etc., etc. (Including bottled beverages and ice cream other than that sold with meals or in soda fountain)	225,900	4.60	-	-
All Other Merchandise, Total	-	-	8,300	0.17

Table 11.--Operating Expenses of Grocery Store Chains, 1941

	All Chains	Chains analyzed according to number of units operated: Chains with less than 25 units	Chains analyzed according to number of units operated: Chains with 25 or more units	Chains analyzed according to type of stores operated: Straight grocery	Chains analyzed according to type of stores operated: Grocery and other
	Column 1	Column 2	Column 3	Column 4	Column 5
A. Number of chains	28	23	5	16	12
B. Number of stores	448	212	236	284	164
C. Sales --					
1. Retail sales through stores	$ 26,523,300	$ 16,069,800	$ 10,453,500	$ 12,475,900	$ 14,047,400
2. Average sales per store	$ 59,204	$ 75,801	$ 44,294	$ 43,929	$ 85,655
3. Wholesale sales to other firms	$ 153,700	$ 84,800	$ 68,900	$ 108,700	$ 45,000
4. Total chain sales	$ 26,677,000	$ 16,154,600	$ 10,522,400	$ 12,584,600	$ 14,092,400

Table 11.--Operating Expenses of Grocery Store Chains, 1941--(Concl'd)

	Column 1	Column 2	Column 3	Column 4	Column 5
D. Store employment and payroll --					
Full-time employees --					
1. Male employees, number	1,262	843	419	495	767
2. Female employees, number	553	290	273	318	235
3. Salaries and wages	$ 1,584,600	$ 916,500	$ 668,100	$ 782,000	$ 802,600
Part-time employees --					
1. Male employees, number	696	422	274	359	337
2. Female employees, number	181	28	153	158	23
3. Salaries and wages	$ 199,200	$ 120,600	$ 78,600	$ 108,300	$ 90,900
E. Chain expenses --					
Store expenses --					
1. Wage cost -- Amount	$ 1,783,800	$ 1,037,100	$ 746,700	$ 890,300	$ 893,500
2. Per cent of total sales	6.69	6.42	7.10	7.07	6.34
3. Other expenses including rent -- Amount	$ 1,422,900	$ 788,000	$ 634,900	$ 643,500	$ 779,400
4. Per cent of total sales	5.33	4.88	6.03	5.11	5.53
5. Total store expenses -- Amount	$ 3,206,700	$ 1,825,100	$ 1,381,600	$ 1,533,800	$ 1,672,900
6. Per cent of total sales	12.02	11.30	13.13	12.18	11.87
Overhead expenses -- Amount	$ 256,400	$ 112,400	$ 144,000	$ 193,500	$ 62,900
Per cent of total sales	0.96	0.70	1.37	1.54	0.45
Warehouse expenses -- Amount	$ 230,300	$ 105,500	$ 124,800	$ 129,800	$ 100,500
Per cent of total sales	0.86	0.65	1.19	1.03	0.71
Total chain expenses -- Amount	$ 3,693,400	$ 2,043,000	$ 1,650,400	$ 1,857,100	$ 1,836,300
Per cent of total sales	13.84	12.65	15.69	14.75	13.03
F. Rentals --					
1. Number of stores in leased premises	429	196	233	281	148
2. Sales of stores in leased premises	$ 22,498,500	$ 12,072,900	$ 10,425,600	$ 12,336,000	$ 10,162,500
3. Rentals paid -- Amount	$ 326,200	$ 153,900	$ 172,300	$ 191,800	$ 134,400
4. Per cent of sales in leased premises	1.45	1.27	1.65	1.55	1.32
G. Inventories, end of 1941 --					
1. Store inventories	$ 1,831,600	$ 879,900	$ 951,700	$ 1,011,300	$ 820,300
2. Warehouse inventories	$ 1,290,700	$ 537,900	$ 752,800	$ 713,200	$ 577,500
3. Total inventories	$ 3,122,300	$ 1,417,800	$ 1,704,500	$ 1,724,500	$ 1,397,800
H. Customers' accounts outstanding	$ 375,500	$ 201,300	$ 174,200	$ 233,400	$ 142,100
Per cent of total sales	1.40	1.24	1.66	1.85	1.00

Table 12.--Operating Expenses of Combination Store Chains, 1941

	All Chains	Chains with less than 25 units	Chains with 25 or more units
A. Number of chains	34	28	6
B. Number of stores	1,093	181	912
C. Sales --			
1. Retail sales through stores	$145,794,100	$ 15,275,600	$130,518,500
2. Average sales per store	$ 133,388	$ 84,395	$ 144,714
3. Wholesale sales to other firms	$ 1,571,300	$ 110,500	$ 1,460,800
4. Total chain sales	$147,365,400	$ 15,386,100	$131,979,300
D. Store employment and payroll --			
Full-time employees --			
1. Male employees, number	5,277	756	4,521
2. Female employees, number	2,007	426	1,581
3. Salaries and wages	$ 7,820,600	$ 1,142,100	$ 6,678,500
Part-time employees --			
1. Male employees, number	3,414	314	3,100
2. Female employees, number	586	99	487
3. Salaries and wages	$ 961,100	$ 76,000	$ 885,100
E. Chain expenses --			
Store expenses --			
1. Wage cost -- Amount	$ 8,781,700	$ 1,218,100	$ 7,563,600
2. Per cent of total sales	5.96	7.92	5.73
3. Other expenses (including rent) Amount	$ 7,345,100	$ 1,016,100	$ 6,329,000
4. Per cent of total sales	4.98	6.60	4.80
5. Total store expenses -- Amount	$ 16,126,800	$ 2,234,200	$ 13,892,600
6. Per cent of total sales	10.94	14.52	10.53
Overhead expenses -- Amount	$ 2,068,000	$ 131,100	$ 1,936,900
Per cent of total sales	1.40	0.85	1.47
Warehouse expenses -- Amount	$ 1,677,100	$ 29,600	$ 1,647,500
Per cent of total sales	1.14	0.19	1.24
Total chain expenses -- Amount	$ 19,871,900	$ 2,394,900	$ 17,477,000
Per cent of total sales	13.48	15.56	13.24
F. Rentals --			
1. Number of stores in leased premises	989	141	848
2. Sales of stores in leased premises	$131,121,000	$ 10,558,600	$120,562,400
3. Rentals paid -- Amount	$ 1,641,900	$ 176,100	$ 1,465,800
4. Per cent of sales in leased premises	1.25	1.66	1.21
G. Inventories, end of 1941 --			
1. Store inventories	$ 5,439,200	$ 997,700	$ 4,441,500
2. Warehouse inventories	$ 4,465,000	$ 157,500	$ 4,307,500
3. Total inventories	$ 9,904,200	$ 1,155,200	$ 8,749,000
H. Customers' accounts outstanding Amount	$ 560,900	$ 400,700	$ 160,200
Per cent of total sales	0.38	0.26	0.12
I. Meat sales only -- Amount	$ 26,572,600	$ 2,956,300	$ 23,616,300
Per cent of total sales	18.03	19.21	17.89

Table 13.--Operating Expenses of Meat and Fish Market Chains, 1941

	All Chains	Chains with less than 15 units	Chains with 15 or more units
A. Number of chains	17	14	3
B. Number of stores	166	83	83
C. Sales --			
1. Retail sales through stores	$ 5,088,500	$ 3,474,500	$ 1,614,000
2. Average sales per store	$ 30,653	$ 41,861	$ 19,446
3. Wholesale sales to other firms	-	-	-
4. Total chain sales	$ 5,088,500	$ 3,474,500	$ 1,614,000
D. Store employment and payroll --			
Full-time employees --			
1. Male employees, number	481	295	186
2. Female employees, number	33	30	3
3. Salaries and wages	$ 529,000	$ 331,800	$ 197,200
Part-time employees --			
1. Male employees, number	216	140	76
2. Female employees, number	9	5	4
3. Salaries and wages	$ 61,900	$ 43,300	$ 18,600
E. Chain expenses --			
Store expenses --			
1. Wage cost -- Amount	$ 590,900	$ 375,100	$ 215,800
2. Per cent of total sales	11.61	10.80	13.37
3. Other expenses including rent -- Amount	$ 424,100	$ 264,900	$ 159,200
4. Per cent of total sales	8.34	7.62	9.86
5. Total store expenses -- Amount	$ 1,015,000	$ 640,000	$ 375,000
6. Per cent of total sales	19.95	18.42	23.23
Overhead expenses -- Amount	$ 69,200	$ 30,900	$ 38,300
Per cent of total sales	1.36	0.89	2.37
Warehouse expenses -- Amount	$ 3,100	$ 3,100	-
Per cent of total sales	0.06	0.09	-
Total chain expenses -- Amount	$ 1,087,300	$ 674,000	$ 413,300
Per cent of total sales	21.37	19.40	25.60
F. Rentals --			
1. Number of stores in leased premises	129	71	58
2. Sales of stores in leased premises	$ 4,204,900	$ 3,172,700	$ 1,032,200
3. Rentals paid -- Amount	$ 103,900	$ 75,200	$ 28,700
4. Per cent of sales in leased premises	2.47	2.37	2.78
G. Inventories, end of 1941 --			
1. Store inventories	$ 116,000	$ 70,800	$ 45,200
2. Warehouse inventories	$ 3,200	$ 3,200	$ -
3. Total inventories	$ 119,200	$ 74,000	$ 45,200
H. Customers' accounts outstanding-- Amount	$ 151,600	$ 55,700	$ 95,900
Per cent of total sales	2.98	1.60	5.94

Table 14.--Food Chains--Middle Range Figures, 1941

A. Grocery Store Chains

	Lower limit of Middle Range	Median	Upper limit of Middle Range
1. Total sales	$210,000	$390,000	$830,000
2. Average sales per store	$ 28,300	$ 39,600	$ 52,400
3. Average salary per full-time store employee	$ 750	$ 890	$ 1,000
4. Average yearly sales per full-time store employee	$ 11,000	$ 13,500	$ 15,100
5. Store payroll cost -- Per cent of total sales	6.4	7.2	8.1
6. Other store expenses -- Per cent of total sales	3.1	4.2	5.3
7. Rent -- (a) Per cent of total sales	1.2	1.6	1.9
(b) Per cent of sales in leased premises	1.3	1.7	1.9
8. Total store expenses -- Per cent of total sales	11.2	13.3	15.2
9. Overhead expenses -- Per cent of total sales	1.2	1.7	2.3
10. Warehouse expenses -- Per cent of total sales	0.7	1.0	1.2
11. Total chain expenses -- Per cent of total sales	13.3	14.6	16.7

B. Combination Store Chains

1. Total sales	$360,000	$560,000	$960,000
2. Average sales per store	$ 53,200	$ 77,600	$111,700
3. Average salary per full-time store employee	$ 800	$ 900	$ 1,130
4. Average yearly sales per full-time store employee	$ 10,700	$ 12,700	$ 15,200
5. Store payroll cost -- Per cent of total sales	6.5	7.6	9.6
6. Other store expenses -- Per cent of total sales	3.5	5.0	6.6
7. Rent -- (a) Per cent of total sales	0.5	1.0	1.7
(b) Per cent of sales in leased premises	1.1	1.5	1.9
8. Total store expenses -- Per cent of total sales	12.3	14.6	17.0
9. Overhead expenses -- Per cent of total sales	1.1	1.5	2.0
10. Warehouse expenses -- Per cent of total sales	1.1	1.2	1.8
11. Total chain expenses -- Per cent of total sales	13.1	16.2	18.2

Table 14.--Food Chains--Middle Range Figures, 1941--(Concl'd)

C. Meat and Fish Market Chains

	Lower limit of Middle Range	Median	Upper limit of Middle Range
1. Total sales	$110,000	$240,000	$340,000
2. Average sales per store	$ 22,400	$ 31,100	$ 42,100
3. Average salary per full-time store employee	$ 970	$ 1,060	$ 1,160
4. Average yearly sales per full-time store employee	$ 7,620	$ 9,700	$ 11,750
5. Store payroll cost -- Per cent of total sales	9.8	12.7	13.4
6. Other store expenses -- Per cent of total sales	4.7	6.0	8.9
7. Rent -- (a) Per cent of total sales.	2.1	2.4	3.0
(b) Per cent of sales in leased premises	2.1	2.5	3.4
8. Total store expenses -- Per cent of total sales	17.4	20.4	24.4
9. Overhead expenses-- Per cent of total sales	2.1	2.5	3.0
10. Warehouse expenses-- Per cent of total sales	-	-	-
11. Total chain expenses -- Per cent of total sales	18.3	21.5	25.2

Note: Since each item on this table was obtained independently, the figures in one column cannot be related to each other. Nor can the individual expense items be added to obtain the total expense ratios shown. For explanation on the method used, see text.

Published by Authority of the Hon. James A. MacKINNON, M.P.,
Minister of Trade and Commerce

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA 1943

OTTAWA
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Price 25 cents

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DEPARTMENT OF TRADE AND COMMERCE
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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA, 1943

SUMMARY

A moderate decline in the total sales of food chains from the all-time high level attained in 1942, a slight decrease in the number of outlets used, and a shift in chain sales to medium-sized stores were the principal features of the food chain trade in 1943 according to a survey compiled by the Merchandising and Services Branch of the Bureau of Statistics. Total sales made in the 1,394 units of the 69 food chains in 1943 amounted to $185,974,600 which compares with sales of $193,488,500 which were made in the 1,431 outlets of 70 food chains in 1942. Although the drop in the number of stores operated conforms with the trend to the utilization of fewer outlets which has been apparent since 1934, the decrease of 3.9 per cent in sales constitutes the first contraction in dollar volume which has occurred since that year.

In spite of the closure of 276 outlets during 1942, total sales of the food chains were 9.1 per cent greater than in 1941. This increase in the dollar volume of business was principally the result of an upward movement in prices, the Bureau's Retail Food Price Index for chain stores rising to 124.9 in 1942, almost 9 per cent above the index figure of 114.9 for 1941. The decrease in sales during 1943 of 3.9 per cent from the level of the previous year however was due to a somewhat larger decline in the physical volume of sales because the same index rose to 127.6 in 1943, about 2 per cent above the average for 1942. This of course is principally a reflection of rationing controls and short supplies of merchandise which became increasingly severe during the latter period.

Percentage changes from 1942 in the total volume of business transacted by chains in the different provinces varied widely from the decrease of 3.9 per cent recorded for the Dominion as a whole. Total sales of food chains operating in the provinces of Ontario, Quebec, British Columbia and Manitoba in 1943 were below the levels prevailing in the previous year, the decreases amounting to 6.6 per cent, 3.2 per cent, 0.7 per cent, and 0.5 per cent, respectively. Sales of food chains in the provinces of Saskatchewan, the Maritime Provinces and Alberta on the other hand expanded during 1943, recording respective increases of 3.3 per cent, 1.7 per cent and 1.5 per cent. Although declines in sales volume varied considerably between the larger cities, chain food stores situated in centres having populations of more than 30,000 persons tended to suffer more than similar outlets in the smaller places, the percentage decreases amounting to 4.4 per cent for the former and 3.0 per cent for the latter group of localities.

A noticeable shift in the distribution of the total sales of the food chains to stores having individual sales volume between $50,000 and $300,000 per year also featured merchandising operations during 1943. Generally, when stores and sales are classified according to amount of annual turnover per store there is a natural tendency for stores to move downward in the sales size classifications with a decrease in total sales. The larger stores then account for a smaller share of the total trade while increased proportions of stores and sales are found in the smaller sales size categories. During 1943 the intermediate sales size groups of stores gained principally at the expense of the two largest sizes of stores, while the smaller outlets obtained only a slightly smaller proportion of the total trade in 1943 than in 1942. This is evidenced by the fact that outlets with individual sales of more than $300,000 per year transacted 44.3 per cent of the total trade in 1942 against 37.6 per cent in 1943 while units with annual sales of less than $50,000 accounted for 8.8 per cent of total sales in 1942 and 8.2 per cent of the dollar volume in 1943. Restrictions on the use of gasoline probably narrowed the area previously served by the larger units, thereby diverting at least some of this trade to the more local chain stores.

Only minor changes occurred between 1942 and 1943 in the distribution of the total sales of the food chains when stores and sales were classified by size of locality. Places with 100,000 or more persons accounted for the same proportions of the total trade in both years. On the other hand chain outlets located in centers having populations between 1,000 and 9,999 persons transacted a slightly larger share of the food chain trade in 1943 than in 1942, thus gaining relatively at the expense of chain units situated in cities having populations between 10,000 and 99,999 persons.

Combination store chains retained their predominance in 1943, accounting for 80.8 per cent of all food chain sales, against 15.9 per cent obtained by the grocery, and 3.3 per cent by the meat market chains. The share of the total trade transacted by combination chains, however, has declined steadily since 1940 when these systems made 85.5 per cent of the total sales of the three kinds of chains. Most of this loss in trade was obtained by the grocery chains which accounted for only 11.5 per cent of all chain sales made in the earlier period.

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Table 1.-- Principal Statistics of Food Chains for Selected Years.

(Grocery, combination and meat market chains combined)

	1930	1934	1939	1941	1942	1943
Number of chains	87	86	87	79	70	69
Maximum number of stores	2,352	2,395	2,044	1,707	1,431	1,394
Total sales (at retail)	$127,582,500	$104,912,800	$127,945,900	$177,405,900	$193,488,500	$185,974,600
Chain sales index (1930=100) .	100.0	82.2	100.3	139.1	151.7	145.8
Per cent change in sales from preceding year	-	+ 1.2	+ 5.4	+ 22.2	+ 9.1	- 3.9

Table 2.-- Principal Statistics of Food Chains by Provinces

(Grocery, combination and meat market chains combined)

		1930	1941	1942	1943	Per cent change in sales 1942-1943
CANADA, TOTAL	Chains	87	79	70	69	-
	Stores	2,352	1,707	1,431	1,394	
	Sales	$127,582,500	$177,405,900	$193,488,500	$185,974,600	- 3.9
British Columbia(1)	Chains	19	14	13	13	
	Stores	246	282	239	229	
	Sales	$10,194,900	$18,765,300	$21,524,400	$21,364,500	- 0.7
Alberta	Chains	8	8	7	7	
	Stores	120	103	90	89	
	Sales	$5,587,000	$7,932,100	$9,578,200	$9,718,900	+ 1.5

Table 2.-- Principal Statistics of Food Chains by Provinces - (Concl'd)

(Grocery, combination and meat market chains combined)

		1930	1941	1942	1943	Per cent change in sales 1942-1943
Saskatchewan	Chains ...	10	4	4	3	
	Stores	165	111	100	94	
	Sales	$6,969,300	$6,794,100	$7,917,400	$8,177,600	+ 3.3
Manitoba	Chains	8	4	3	3	
	Stores	121	85	60	60	
	Sales	$5,689,100	$8,247,500	$9,268,300	$9,223,500	- 0.5
Ontario	Chains	37	41	38	38	
	Stores	1,107	790	664	654	
	Sales	$70,769,300	$99,318,600	$103,499,200	$96,692,400	- 6.6
Quebec	Chains	13	7	6	6	
	Stores	495	214	180	171	
	Sales	$23,708,400	$28,477,200	$32,946,400	31,890,600	- 3.2
Maritime Provinces	Chains	12	14	11	11	
	Stores	98	122	98	97	
	Sales	$4,664,500	$7,871,100	$8,754,600	$8,907,100	+ 1.7

(1) Includes Yukon and Northwest Territories.

Table 3.-- Principal Statistics of Food Chains Classified by Kind of Business, 1943.

		All food store chains	Grocery store chains	Combination store chains	Meat market chains
	No. of chains	69	24	32	13
	No. of stores (maximum)	1,394	386	883	125
1943 -	Value of chain sales	$185,974,600	$29,497,700	$150,335,800	$6,141,100
	Per cent of all food chain sales	100.0	15.9	80.8	3.3
	Average sales per store	$133,411	$76,419	$170,256	$49,129
	No. of chains	70	24	32	14
	No. of stores (maximum)	1,431	394	899	138
1942 -	Value of chain sales	$193,488,500	$29,330,600	$158,785,700	$5,372,200
	Per cent of all food chain sales	100.0	15.2	82.1	2.7
	Average sales per store	$135,212	$74,443	$176,625	$38,929
	No. of chains	79	28	34	17
	No. of stores (maximum)	1,707	448	1,093	166
1941	Value of chain sales	$177,405,900	$26,523,300	$145,794,100	$5,088,500
	Per cent of all food chain sales	100.0	14.9	82.2	2.9
	Average sales per store	$103,928	$59,204	$133,388	$30,653
	No. of chains	82	22	44	16
	No. of stores (maximum)	1,817	383	1,267	167
1940	Value of chain sales	$145,193,900	$16,713,000	$124,092,700	$4,388,200
	Per cent of all food chain sales	100.0	11.5	85.5	3.0
	Average sales per store	$79,909	$43,637	$97,942	$26,277
	No. of chains	89	31	44	14
	No. of stores (maximum)	2,287	498	1,627	162
1937 -	Value of chain sales	$121,054,800	$20,167,700	96,222,000	$4,665,100
	Per cent of all food chain sales	100.0	16.7	79.5	3.8
	Average sales per store	$52,932	$40,497	$59,140	$28,797
	No. of chains	86	40	34	12
	No. of stores (maximum)	2,395	746	1,493	156
1934 -	Value of chain sales	$104,912,800	$37,390,600	$63,484,300	$4,037,900
	Per cent of all food chain sales	100.0	35.6	60.5	3.9
	Average sales per store	$43,805	$50,121	$42,521	$25,884

Table 3.-- Principal Statistics of Food Chains Classified by Kind of Business, 1943 - (Concl'd)

	All food store chains	Grocery store chains	Combination store chains	Meat market chains
No. of chains	87	43	23	21
No. of stores (maximum)	2,352	748	1,379	225
1930 - Value of chain sales	$127,582,500	$44,698,400	$74,800,200	$8,083,900
Per cent of all food chain sales	100.0	35.0	58.6	6.4
Average sales per store	$54,244	$59,757	$54,242	$35,929

Table 4.-- Kinds of Stores Operated by Combination Store Chains, 1941, 1942, 1943.

	Number of Chains	Total Units		Grocery Units		Combination Units	
		Number	Sales	Number	Sales	Number	Sales
			$		$		$
				1943			
All combination store chains, total	32	(1)883	150,335,800	253	18,841,100	623	131,150,900
Less than 10 units	24	(1)134	13,330,100	23	1,239,500	104	11,746,800
10-99 units	4	109	10,961,800	37	2,245,500	72	8,716,300
100 units and over	4	640	126,043,900	193	15,356,100	447	110,687,800
				1942			
All combination store chains, total	32	(2)899	158,785,700	260	19,269,300	632	139,214,000
Less than 10 units	24	(2)136	13,403,000	25	1,364,000	104	11,736,600
10-99 units	4	118	10,624,100	42	2,425,000	76	8,199,100
100 units and over	4	645	134,758,600	193	15,480,300	452	119,278,300
				1941			
All combination store chains, total	34	(3)1,093	145,794,100	323	18,977,400	762	126,509,700
Less than 10 units	27	(3) 162	14,345,300	31	1,562,900	123	12,475,400
10-99 units	3	144	9,477,000	42	2,317,500	102	7,159,500
100 units and over	4	787	121,971,800	250	15,097,000	537	106,874,800

(1) Includes 7 stores with sales of $343,800 which cannot be classified as either grocery or combination type.
(2) Includes 7 stores with sales of $302,400 which cannot be classified as either grocery or combination type.
(3) Includes 8 stores with sales of $307,000 which cannot be classified as either grocery or combination type.

Table 5.-- Food Chains Classified According to Number of Stores Operated, 1941, 1942 and 1943

(Grocery, combination and meat market chains combined)

Number of Units	1941				1942			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	79	1,707	177,405,900	100.0	70	1,431	193,488,500	100.0
Less than 10 units	56	318	21,331,200	12.0	48	263	20,108,400	10.4
10-99 units	19	602	34,103,000	19.2	18	523	38,621,500	20.0
100 units and over	4	787	121,971,700	68.8	4	645	134,758,600	69.6

Number of Units	1943			
	Number of chains	Number of stores	Total sales	
			Amount	Per cent of total
			$	
All food chains, Total	69	1,394	185,974,600	100.0
Less than 10 units	48	261	20,575,700	11.1
10-99 units	17	493	39,355,000	21.2
100 units and over	4	640	126,043,900	67.7

Table 6.-- Food Chains Classified According to Amount of Annual Sales, 1941, 1942 & 1943

(Grocery, combination and meat market chains combined)

Annual Sales	1941				1942			
	Number of chains	Number of stores	Total Sales		Number of chains	Number of stores	Total Sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	79	1,707	177,405,900	100.0	70	1,431	193,488,500	100.0
$1,000,000 and over	14	1,154	152,322,200	85.8	17	1,047	172,739,500	89.3
$ 500,000 - $999,999	21	285	14,859,600	8.4	16	183	11,004,700	5.7
$ 300,000 - $499,999	13	96	5,061,700	2.9	14	77	5,601,500	2.9
$ 200,000 - $299,999	13	86	3,059,900	1.7	11	72	2,645,800	1.4
Less than $200,000	18	86	2,102,500	1.2	12	52	1,497,000	0.7

Annual Sales	1943			
	Number of chains	Number of stores	Total Sales	
			Amount	Per cent of total
			$	
All food chains, Total	69	1,394	185,974,600	100.0
$1,000,000 and over	19	1,083	167,058,600	89.8
$ 500,000 - $999,999 ...	12	114	8,344,000	4.5
$ 300,000 - $499,999 ...	15	84	6,053,700	3.3
$ 200,000 - $299,999 ...	12	65	2,975,800	1.6
Less than 200,000	11	48	1,542,500	0.8

Table 7.-- Food Chain Units Classified by Size of Business, 1942 and 1943

(Grocery, combination and meat market chains combined)

Annual Sales	1942				1943			
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent
		$				$		
All food chains, Total	1,431	193,488,500	100.0	-	1,394	185,974,600	100.0	-
$1,000,000 and over	-	-	-	-	-	-	-	-
$ 500,000 - $999,999	51	31,899,700	16.5	-	33	20,271,900	10.9	-
$ 300,000 - $499,999	140	53,747,200	27.8	44.3	132	49,709,600	26.7	37.6
$ 200,000 - $299,999	134	32,499,800	16.8	61.1	149	36,277,300	19.5	57.1
$ 100,000 - $199,999	242	35,096,700	18.1	79.2	275	39,817,600	21.4	78.5
$ 50,000 - $ 99,999	338	23,303,900	12.0	91.2	353	24,825,200	13.3	91.8
$ 30,000 - $ 49,999	328	12,944,300	6.7	97.9	296	11,853,600	6.4	98.2
$ 20,000 - $ 29,999	119	2,997,600	1.5	99.4	98	2,550,600	1.4	99.6
$ 10,000 - $ 19,999	57	885,000	0.5	99.9	36	565,500	0.3	99.9
$ 5,000 - $ 9,999	11	89,400	0.1	100.0	12	81,700	0.1	100.0
Less than $5,000	11	24,900			10	21,600		

Table 8.-- Food Chain Stores and Sales, by Provinces and Size of Locality, 1942

(Grocery, combination and meat market chains combined)

Province	All Localities			Stores and sales in places with population of --					
				Over 100,000			30,000 - 100,000		
	No. of Stores	Total Chain Sales		No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales
		Value	%						
		$			$			$	
CANADA, Total	1,431	193,488,500	100.0	549	86,038,900	44.4	213	35,745,500	18.5
Yukon and Northwest Territories	1	(x)	100.0	-	-	-	-	-	-
British Columbia	238	(x)	100.0	116	10,726,300	49.8	11	2,454,900	11.4
Alberta	90	9,578,200	100.0	-	-	-	58	6,695,700	69.9
Saskatchewan	100	7,917,400	100.0	-	-	-	37	4,013,500	50.7
Manitoba	60	9,268,300	100.0	44	(x)	(x)	-	-	-
Ontario	664	103,499,200	100.0	296	49,430,800	47.8	53	12,123,100	11.7
Quebec	180	32,946,400	100.0	93	(x)	(x)	29	6,621,800	20.1
New Brunswick	22	1,702,200	100.0	-	-	-	6	(x)	(x)
Nova Scotia	76	7,052,400	100.0	-	-	-	19	(x)	(x)
Prince Edward Island	-	-	-	-	-	-	-	-	-

Province	Stores and sales in places with population of --								
	10,000 to 30,000			1,000 to 10,000			Less than 1,000		
	No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales
		$			$			$	
CANADA, Total	181	30,869,400	16.0	335	30,712,900	15.9	153	10,121,800	5.2
Yukon and Northwest Territories	-	-	-	-	-	-	1	(x)	(x)
British Columbia	17	(x)	(x)	44	3,905,300	18.2	50	(x)	(x)
Alberta	5	1,126,900	11.8	15	1,274,100	13.3	12	481,500	5.0
Saskatchewan	12	(x)	(x)	23	1,947,300	24.6	28	(x)	(x)
Manitoba	5	(x)	(x)	5	(x)	(x)	6	(x)	(x)
Ontario	96	19,872,900	19.2	177	17,140,700	16.6	42	4,931,700	4.7
Quebec	25	3,704,400	11.2	31	3,215,200	9.8	2	(x)	(x)
New Brunswick	3	(x)	(x)	8	(x)	(x)	5	(x)	(x)
Nova Scotia	18	1,876,100	26.6	32	1,970,900	27.9	7	(x)	(x)
Prince Edward Island	-	-	-	-	-	-	-	-	-

Table 9.-- Food Chain Stores and Sales by Provinces and Size of Locality, 1943

(Grocery, combination and meat market chains combined)

Province	All Localities			Stores and sales in places with population of --					
				Over 100,000			30,000 - 100,000		
	No. of Stores	Total Chain Sales		No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales
		Value	%						
		$			$			$	
CANADA, Total	1,394	185,974,600	100.0	536	82,585,100	44.4	205	33,721,700	18.1
Yukon and Northwest Territories	-	-	-	-	-	-	-	-	-
British Columbia	229	21,364,500	100.0	111	10,704,100	50.1	11	2,218,100	10.4
Alberta	89	9,718,900	100.0	-	-	-	58	6,808,100	70.0
Saskatchewan	94	8,177,600	100.0	-	-	-	31	4,064,400	49.7
Manitoba	60	9,223,500	100.0	44	(x)	(x)	-	-	-
Ontario	654	96,692,400	100.0	291	46,349,800	47.9	53	10,836,400	11.2
Quebec	171	31,890,600	100.0	90	(x)	(x)	27	6,120,200	19.2
New Brunswick	22	1,658,900	100.0	-	-	-	6	(x)	(x)
Nova Scotia	75	7,248,200	100.0	-	-	-	19	(x)	(x)
Prince Edward Island	-	-	-	-	-	-	-	-	-

Province	Stores and sales in places with population of --								
	10,000 to 30,000			1,000 to 10,000			Less than 1,000		
	No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales	No. of Stores	Value of sales	Per cent of total chain sales
		$			$			$	
CANADA, Total	174	29,115,300	15.7	328	30,694,500	16.5	151	9,858,000	5.3
Yukon and Northwest Territories	-	-	-	-	-	-	-	-	-
British Columbia	16	1,622,000	7.6	41	3,995,900	18.7	50	2,824,400	13.2
Alberta	4	1,078,100	11.1	15	1,301,900	13.4	12	530,800	5.5
Saskatchewan	12	(x)	(x)	23	2,065,600	25.3	28	(x)	(x)
Manitoba	5	(x)	(x)	5	(x)	(x)	6	(x)	(x)
Ontario	94	18,353,100	19.0	175	16,687,400	17.3	41	4,465,700	4.6
Quebec	22	3,550,600	11.0	30	3,143,600	9.9	2	(x)	(x)
New Brunswick	3	(x)	(x)	8	(x)	(x)	5	(x)	(x)
Nova Scotia	18	1,951,000	26.9	31	2,163,500	29.8	7	(x)	(x)
Prince Edward Island	-	-	-	-	-	-	-	-	-

Table 10.-- Food Chains - Stores and Sales by Provinces and for Cities of 30,000 Population or Over, 1942, 1943

Province and City	Number of Stores		Value of Sales		
	1942	1943	1942	1943	Per cent of change
CANADA, Total	1,431	1,394	$193,488,500	$185,974,600	- 3.9
Places 30,000 and over, total	754	734	$120,060,300	$114,728,000	- 4.4
Places under 30,000, total	677	660	$ 73,428,200	$ 71,256,600	- 3.0
British Columbia, Total	238	229	$ 21,520,500	$ 21,364,500	- 0.7
Places 30,000 and over, total	127	122	$ 13,181,200	$ 12,922,200	- 2.0
Vancouver	116	111	$ 10,726,300	$ 10,704,100	- 0.2
Victoria	11	11	$ 2,454,900	$ 2,218,100	- 9.6
Places under 30,000, total	111	107	$ 8,339,300	$ 8,442,300	+ 1.2
Alberta, Total	90	89	$ 9,578,200	$ 9,718,900	+ 1.5
Places 30,000 and over, total	58	58	$ 6,695,700	$ 6,808,100	+ 1.7
Calgary	41	41	$ 4,280,400	$ 4,195,100	- 2.0
Edmonton	17	17	$ 2,415,300	$ 2,613,000	+ 8.2
Places under 30,000, total	32	31	$ 2,882,500	$ 2,910,800	+ 1.0
Saskatchewan, Total	100	94	$ 7,917,400	$ 8,177,600	+ 3.3
Places 30,000 and over, total	37	31	$ 4,013,500	$ 4,064,400	+ 1.3
Regina	25	20	(x)	(x)	(x)
Saskatoon	12	11	(x)	(x)	(x)
Places under 30,000, total	63	63	$ 3,903,900	$ 4,113,200	+ 5.4
Manitoba, Total	60	60	$ 9,268,300	$ 9,223,500	- 0.5
Places 30,000 and over, total	44	44	$ 6,597,800	$ 6,569,300	- 0.4
Winnipeg	44	44	(x)	(x)	(x)
Places under 30,000, total	16	16	(x)	(x)	(x)
Ontario, Total	664	654	$103,499,200	$ 96,692,400	- 6.6
Places 30,000 and over, total	349	344	$ 61,553,900	$ 57,186,200	- 7.1
Brantford	11	11	$ 1,535,600	$ 1,291,400	-15.9
Fort William	5	5	(x)	(x)	(x)
Hamilton	83	83	$ 8,177,700	$ 7,296,300	-10.8
Kingston	4	4	(x)	(x)	(x)
Kitchener	4	4	$ 1,515,800	$ 1,356,200	-10.5
London	11	11	$ 3,128,300	$ 2,840,600	- 9.2
Ottawa	38	38	$ 6,778,500	$ 6,571,600	- 3.1
St. Catherines	10	10	$ 2,238,500	$ 1,986,100	-11.3
Sudbury	8	8	$ 1,819,300	$ 1,542,400	-15.2
Toronto	157	152	$ 29,885,000	$ 28,266,300	- 5.4
Windsor	18	18	$ 4,589,600	$ 4,215,600	- 8.1
Places under 30,000, total	315	310	$ 41,945,300	$ 39,506,200	- 5.8
Quebec, Total	180	171	$ 32,946,400	$ 31,890,600	- 3.2
Places 30,000 and over, total	114	110	$ 24,181,700	$ 23,503,100	- 2.8
Hull	1	1	(x)	(x)	(x)
Montreal	90	87	$ 18,362,800	$ 18,067,300	- 1.6

Table 10.-- Food Chains - Stores and Sales by Provinces and for Cities of 30,000 Population or Over, 1942, 1943 - (Concl'd)

Province and City	Number of Stores		Value of Sales		
	1942	1943	1942	1943	Per cent of change
Quebec, - (Concl'd)					
Quebec	3	3	(x)	(x)	(x)
Sherbrooke	2	2	(x)	(x)	(x)
Three Rivers	3	3	(x)	(x)	(x)
Verdun	15	14	$ 3,000,600	$ 2,960,300	- 1.7
Places under 30,000, total	66	61	$ 8,764,700	$ 8,387,500	- 4.3
Maritime Provinces, Total	99	97	$ 8,758,500	$ 8,907,100	+ 1.7
Places 30,000 and over, total	25	25	$ 3,836,500	$ 3,674,700	- 4.2
Halifax	19	19	(x)	(x)	(x)
Saint John	6	6	(x)	(x)	(x)
Places under 30,000, total	74	72	$ 4,922,000	$ 5,232,400	+ 6.3

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1943

Grocery Store Chains

B. & K. Economy Stores, Ltd.,	1484 West Broadway	Vancouver, B.C.
Boyle, H. J. Co., Ltd.,	60 Hunter St., E.,	Peterborough, Ont.
Butti, Sam (Carload Groceterias)	268 Ferguson St.,	North Bay, Ont.
Carroll's Ltd.,	19 Hughson St., S.,	Hamilton, Ont.
Curry's Grocery	6115 Fraser St.,	Vancouver, B.C.
Ford's Groceteria	960 St. Paul St., W.,	Montreal, Que.
Gowman, The Grocery	181 Colborne St.,	Brantford, Ont.
Hickman Stores, The	843 Bank St.,	Ottawa, Ont.
Jenkins' Groceteria, Ltd.,	702-9th Ave., W.,	Calgary, Alta.
McBride's, Ltd.,	1333 Garnet St.,	Regina, Sask.
Model Grocery, Ltd.,	308-6th St.,	New Westminster, B.C.
O.K. Economy Stores	301 Ontario Ave.,	Saskatoon, Sask.
Overwaitea, Ltd.,	1181 Richards St.,	Vancouver, B.C.
Pinch, The J. C. Stores	536 Queen St., E.,	Sault Ste Marie, Ont.
Quality Food Stores	420 Bathurst St.,	Toronto, Ont.
Quality Groceteria Co.,	71 Emerald St., S.,	Hamilton, Ont.
Ray's Superior Stores, Ltd.,	207 West Hastings St.,	Vancouver, B.C.
Robertson, S. M., Ltd.,		Shelburne, N.S.
Steinberg's Wholesale Groceterias, Ltd.,	1430 Overdale	Montreal, Que.
Tait, Harry Groceterias Ltd.,	10012-101st Ave.,	Edmonton, Alta.
Thomson Groceries, Ltd.,	Rear of 302 Greenwood Ave.,	Toronto, Ont.
Toronto Grocery Stores	290 Queen St., E.,	Toronto, Ont.
Wilbee's Service Stores, Ltd.,	6027 Fraser St.,	Vancouver, B.C.
Ziebell Stores	149 Pembroke St., W.,	Pembroke, Ont.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1943 - (Concl'd)

Combination Store Chains

Acadia Stores, Ltd.,	245 Hollis St.,	Halifax, N.S.
Barkers Grocery	100 Princess St.,	Saint John, N.B.
Barker's Stores, Ltd.,	Provost St.,	New Glasgow, N.S.
Bassin's Food Markets	41 Colborne St.,	Toronto, Ont.
Carload Grocery (Bertrand Bros.)	634 Notre Dame St.,	Sudbury, Ont.
The Consumers Cooperative Society Ltd.,	64-4th Ave.,	Timmins, Ont.
Cosmopolitan, The Stores	214 Townsend St.,	Sydney, N.S.
Curtis Markets	1028 Pape Ave.,	Toronto, Ont.
David's Market, Ltd.,	106 Townsend St.,	Sydney, N.S.
Dionne Ltee	5005 Blvd. Decarie	Montreal, Que.
Dominion Stores, Ltd.,	3 Sullivan St.,	Toronto, Ont.
Fitzpatrick & Geraghty, Ltd.,	198 Rubidge St.,	Peterborough, Ont.
Five United Markets, Ltd.,	37 Giles Blvd.,	Windsor, Ont.
Great A. & P. Tea Co., Ltd.,	135 Laughton Ave.,	Toronto, Ont.
International Provision Co., Ltd.,	626 Barrington St.,	Halifax, N.S.
Jewel Stores, Ltd.,	283 Stanley St.,	Winnipeg, Man.
Loblaw Groceterias Co., Ltd.,	Fleet & Bathurst Sts.,	Toronto, Ont.
Mason's Grocery Stores	429 George St.,	Peterborough, Ont.
Powell & Co., Ltd.,	King & Main Sts.,	Dundas, Ont.
Power Food Markets	118 King St. E.,	Toronto, Ont.
Progressive Trading Cooperative Ltd.,	638 Queen St., W.,	Toronto, Ont.
Ray's Limited	1105 Dominion Blvd.,	Vancouver, B.C.
Safeway Stores, Ltd.,	313 Pacific Ave.,	Winnipeg, Man.
Salmo-Ymir Meat Market Ltd.,		Salmo, B.C.
Shop-Easy Stores, Ltd.,	204 Confederation Life Bldg.,	Winnipeg, Man.
Shoprite Stores	1502-12th Ave., W.,	Calgary, Alta.
Shore's Chain Stores	Main St.,	Glace Bay, N.S.
J. W. Sobey		Stellarton, N.S.
Thrift Stores, Ltd.,	960 Outremont Ave.,	Montreal, Que.
Welch, H. W., Ltd.,	Deer Island	Leonardville, N.B.
Whyte Packing Co., The Ltd.,	78 Linton Ave.,	Stratford, Ont.
Workers' Cooperative of New Ontario, Ltd.,	64-3rd Ave.,	Timmins, Ont.

Meat Market Chains

Buehler Bros., Ltd.,	2926 Dundas St., W.,	Toronto, Ont.
Burns & Co., Ltd.,		Calgary, Alta.
Calvert - Willis	1232 Dundas St., W.,	Toronto, Ont.
Len Collins, Ltd.,	475 Danforth Ave.,	Toronto, Ont.
Cooper, Joseph, Ltd.,	2304 Bloor St., W.,	Toronto, Ont.
Cross' Stores, Ltd.,	1310 Douglas St.,	Victoria, B.C.
Duff's Meat Stores and Master Meat Markets Co. of Canada	100 Vine St.,	Hamilton, Ont.
O. K. Stores, Ltd.,	501 Dominion Bank Bldg.,	Vancouver, B.C.
Phillips Markets, Ltd.,	805 Howard Ave.,	Windsor, Ont.
Poyntz, A.	790 St. Clair Ave., W.,	Toronto, Ont.
Pure Food Meat Markets	1505 Gerrard St., E.,	Toronto, Ont.
Sterling Food Markets, Ltd.,	18 West Hastings St.,	Vancouver, B.C.
Swanwick, A.	428 King St. W.,	Hamilton, Ont.

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Minister of Trade and Commerce

CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA 1944

OTTAWA
1945

Price 25 cents

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DOMINION BUREAU OF STATISTICS
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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA, 1944

SUMMARY

An increase of about 10 per cent in sales for 1944 over 1943 contrasted with a drop of almost 4 per cent in 1943 from 1942, a probable relative gain in chain sales at the expense of independent food retailers, an increase in average sales per chain store, and comparative stability during 1943 and 1944 in the distribution of chain sales throughout the different size-groups of chain companies are the principal conclusions to be drawn from the annual survey of food chains for 1944 recently compiled by the Merchandising and Services Branch of the Bureau of Statistics.

Total sales made by all grocery, combination and meat market chains during 1944 amounted to $204,852,500, up by 10.2 per cent from the $185,974,600 realized in the preceding calendar period and constituting a new high in the sales volume of these systems. This relative increase in dollar volume is also indicative of some gain in the physical volume of merchandise sold, for the Bureau's Retail Food Price Index for chain stores averaging 127.6 for 1943 rose only to an average of 128.0 for 1944. The gain in sales volume was also spread fairly evenly throughout the different economic regions of Canada, less-than-average increases being made in British Columbia, Manitoba and the Maritime Provinces, where gains of 5.5 per cent, 7.0 per cent, and 7.8 per cent, respectively were recorded.

Certain evidence suggesting that the food chains on an overall basis were able to better their competitive position during 1944 at the expense of independent food stores arises from a comparison of the sales increases recorded by the food chains and independent stores during the same year. Thus the gain of 10.2 per cent in total chain sales compares with an average increase of only 4.5 per cent for the other main type of retail food outlets. It should be noted that the independents' sales increase of 4.5 per cent over 1943 is based on the monthly sales of a continuing sample of these stores. The percentage gain for independents therefore does not reflect the additional sales resulting from any net increase in the number of independent stores between the two years. Thus the gain in the food chains' share of the sales of all food stores is probably not as great as that suggested from a comparison of the two rates of increase. These proportions for the food chains stood at 26.5 per cent for 1941, the Census Year, and at estimated ratios of 25.2 per cent for 1942 and 23.0 per cent for 1943.

Combination store chains, principally composed of combination outlets handling both groceries and fresh meats, as in other recent years dominated the food

chain trade during 1944 with sales of $167,732,700 for about 82 per cent of the volume of all the food chains. This of course is the result of the pronounced trend toward the establishment of this larger and more integrated kind of store which featured the period between 1930 and 1940. Indeed in the earlier year only 58.6 per cent of the sales of the food chains were made by the combination systems, with 35.0 per cent and 6.4 of the dollar volume being made by the grocery and meat market chains. In this regard it will be noted that stores operated by combination chains in general were considerably larger than either the grocery or the meat market chain outlets, the average turnover for combination chains being $193,240 per store in 1944 against $82,436 per store for grocery and $50,768 for meat market chain units.

Classification of the food chains according to number of units operated indicated that the four companies operating 100 or more units in both 1943 and 1944 obtained in the latter year a slightly larger share of the total trade with 69.7 per cent of the sales in 1944 against 67.7 per cent in the earlier year. This relative improvement was made partly at the expense of systems having between 10 and 100 outlets and those with less than 10 units, the former doing 20.3 per cent of the business in 1944 against 21.2 per cent in the previous year, while the percentages for the smallest group stood at 10.0 in 1944 and 11.1 per cent in the earlier period.

Stability characterized the proportionate distribution of chain sales in the two recent years when these systems were classified into 5 size groups according to their sales volumes. The largest group of chains with annual sales volumes of $1,000,000 or over, however, dominated these distributions accounting for about 90 per cent of the sales of the food chain trade in 1943 and 1944. Eighteen of the 67 chain firms reporting for 1944 had total sales of over $1,000,000 and operated 1,061 of the 1,364 outlets reported by all food chains. On the average these concerns realized an annual turnover of $174,667 per store in 1944 against an average of $64,457 per store for the remaining chains, a comparison which indicates the importance the larger chains place upon high store volumes and the success they have had over a period of years in developing these outlets. That this is due primarily to the use of the combination kind of store is shown by the fact that combination chains had average sales of $193,240 per store in 1944. The trend to this kind of food store, however, has not been confined to the chain systems for combination food stores as a class recorded increases of about 20 per cent in number and 86 per cent in sales between 1930 and 1941.

During 1944 individual outlets of the food chains shifted upward in the size-of-business scale when classified according to their dollar volumes. This of course is partly at least the result of the overall gain of 10.2 per cent in chain sales which by increasing the sales of individual outlets caused many to shift to higher sales-size categories. As a consequence, the relative share of the total sales made by stores with annual turnovers in excess of $500,000 per store rose from 10.9 per cent in 1943 to 15.9 per cent in the later period. The number of stores in this bracket also increased from 33 to 53 in the two periods, due largely to the transference of stores from the $300,000 to $500,000 category. Sales-wise, this group augmented by stores moving upward from the lower group was able to retain its proportionate position between the two years, a situation also true of the $200,000 to $300,000 store sales bracket. Due to this upward shift, stores with annual sales below $200,000 in 1944 were responsible for smaller proportions of the total sales than in 1943.

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Table 1.-- Principal Statistics of Food Chains for Selected Years

(Grocery, combination and meat market chains combined)

	1930	1939	1941	1942	1943	1944
Number of chains	87	87	79	70	69	67
Maximum number of stores	2,352	2,044	1,707	1,431	1,394	1,364
Total sales (at retail)	$127,582,500	$127,945,900	$177,405,900	$193,488,500	$185,974,600	$204,852,500
Chain sales index (1930=100)..	100.0	100.3	139.1	151.7	145.8	160.6
Per cent change in sales from preceding year	-	+ 5.4	+ 22.2	+ 9.1	- 3.9	+ 10.2

Table 2.-- Principal Statistics of Food Chains by Provinces

(Grocery, combination and meat market chains combined)

		1930	1941	1943	1944	Per cent change in sales 1943-1944
CANADA, TOTAL	Chains	87	79	69	67	
	Stores	2,352	1,707	1,394	1,364	
	Sales	$127,582,500	$177,405,900	$185,974,600	$204,852,500	+ 10.2
British Columbia(1)	Chains	19	14	13	12	
	Stores	246	282	229	224	
	Sales	$10,194,900	$18,765,300	$21,364,500	$22,537,500	+ 5.5
Alberta	Chains	8	8	8	7	
	Stores	120	103	89	91	
	Sales	$5,587,000	$7,932,100	$9,718,900	$10,772,100	+ 10.8

Table 2.-- Principal Statistics of Food Chains by Provinces - (Concl'd)

(Grocery, combination and meat market chains combined)

		1930	1941	1943	1944	Per cent change in sales 1943-1944
Saskatchewan	Chains	10	4	3	3	
	Stores	165	111	94	90	
	Sales	$6,969,300	$6,794,100	$8,177,600	$9,088,300	+ 11.1
Manitoba	Chains	8	4	3	3	
	Stores	121	85	60	60	
	Sales	$5,689,100	$8,247,500	$9,223,500	$9,867,900	+ 7.0
Ontario	Chains	37	41	38	36	
	Stores	1,107	790	654	633	
	Sales	$70,769,300	$99,318,600	$96,692,400	$108,121,500	+ 11.8
Quebec	Chains	13	7	6	6	
	Stores	495	214	171	172	
	Sales	$23,708,400	$28,477,200	$31,890,600	$34,864,000	+ 9.3
Maritime Provinces	Chains	12	14	11	11	
	Stores	98	122	97	94	
	Sales	$4,664,500	$7,871,100	$8,907,100	$9,601,200	+ 7.8

(1) Includes Yukon and Northwest Territories.

Table 3.-- Principal Statistics of Food Chains Classified by Kind of Business, 1930, and 1940-1944

		All food store chains	Grocery store chains	Combination store chains	Meat market chains
1930 -	No. of chains	87	43	23	21
	No. of stores (maximum)	2,352	748	1,379	225
	Value of chain sales	$127,582,500	$44,698,400	$74,800,200	$8,083,900
	Per cent of all food chain sales	100.0	35.0	58.6	6.4
	Average sales per store	$54,244	$59,757	$54,242	$35,929
1940 -	No. of chains	82	22	44	16
	No. of stores (maximum)	1,817	383	1,267	167
	Value of chain sales	$145,193,900	$16,713,000	$124,092,700	$4,388,200
	Per cent of all food chain sales	100.0	11.5	85.5	3.0
	Average sales per store	$79,909	$43,637	$97,942	$26,277
1941 -	No. of chains	79	28	34	17
	No. of stores (maximum)	1,707	448	1,093	166
	Value of chain sales	$177,405,900	$26,523,300	$145,794,100	$5,088,500
	Per cent of all food chain sales	100.0	14.9	82.2	2.9
	Average sales per store	$103,928	$59,204	$133,388	$30,653
1942 -	No. of chains	70	24	32	14
	No. of stores (maximum)	1,431	394	899	138
	Value of chain sales	$193,488,500	$29,330,600	$158,785,700	$5,372,200
	Per cent of all food chain sales	100.0	15.2	82.1	2.7
	Average sales per store	$135,212	$74,443	$176,625	$38,929
1943 -	No. of chains	69	24	32	13
	No. of stores (maximum)	1,394	386	883	125
	Value of chain sales	$185,974,600	$29,497,700	$150,335,800	$6,141,100
	Per cent of all food chain sales	100.0	15.9	80.8	3.3
	Average sales per store	$133,411	$76,419	$170,256	$49,129
1944 -	No. of chains	67	24	31	12
	No. of stores (maximum)	1,364	377	868	119
	Value of chain sales	$204,852,500	$31,078,400	$167,732,700	$6,041,400
	Per cent of all food chain sales	100.0	15.2	81.9	2.9
	Average sales per store	$150,185	$82,436	$193,240	$50,768

Table 4.-- Kinds of Stores Operated by Combination Store Chains, 1942, 1943, 1944

	Number of Chains	Total Units		Grocery Units		Combination Units	
		Number	Sales $	Number	Sales $	Number	Sales $
1942							
All combination store chains, total	32	(1) 899	158,785,700	260	19,269,300	632	139,214,000
Less than 10 units	24	(1) 136	13,403,000	25	1,364,000	104	11,736,600
10-99 units	4	118	10,624,100	42	2,425,000	76	8,199,100
100 units and over	4	645	134,758,600	193	15,480,300	452	119,278,300
1943							
All combination store chains, total	32	(2) 883	150,335,800	253	18,841,100	623	131,150,900
Less than 10 units	24	(2) 134	13,330,100	23	1,239,500	104	11,746,800
10-99 units	4	109	10,961,800	37	2,245,500	72	8,716,300
100 units and over	4	640	126,043,900	193	15,356,100	447	110,687,800
1944							
All combination store chains, total	31	(3) 868	167,732,700	250	21,633,500	614	145,838,400
Less than 10 units	23	(3) 127	13,371,400	25	1,374,900	98	11,735,700
10-99 units	4	109	11,533,600	36	2,368,900	73	9,164,700
100 units and over	4	632	142,827,700	189	17,889,700	443	124,938,000

(1) Includes 7 stores with $302,400 sales which cannot be classified as either grocery or combination stores.
(2) Includes 7 stores with $343,800 sales which cannot be classified as either grocery or combination stores.
(3) Includes 4 stores with sales of $260,800 which cannot be classified as either grocery or combination stores.

Table 5.-- Food Chains Classified According to Number of Stores Operated, 1942, 1943 and 1944

(Grocery, combination and meat market chains combined)

Number of Units	1942				1943			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	70	1,431	193,488,500	100.0	69	1,394	185,974,600	100.0
Less than 10 units	48	263	20,108,400	10.4	48	261	20,575,700	11.1
10-99 units	18	523	38,621,500	20.0	17	493	39,355,000	21.2
100 units and over	4	645	134,758,600	69.6	4	640	126,043,900	67.7

Number of Units	1944			
	Number of chains	Number of stores	Total sales	
			Amount	Per cent of total
			$	
All food chains, Total	67	1,364	204,852,500	100.0
Less than 10 units	46	245	20,360,600	10.0
10-99 units	17	487	41,664,200	20.3
100 units and over	4	632	142,827,700	69.7

Table 6.-- Food Chains Classified According to Amount of Annual Sales, 1942, 1943 and 1944

(Grocery, combination and meat market chains combined)

Annual Sales	1942				1943			
	Number of chains	Number of stores	Total Sales		Number of chains	Number of stores	Total Sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	70	1,431	193,488,500	100.0	69	1,394	185,974,600	100.0
$1,000,000 and over	17	1,047	172,739,500	89.3	19	1,083	167,058,600	89.8
$ 500,000 - $999,999	16	183	11,004,700	5.7	12	114	8,344,000	4.5
$ 300,000 - $499,999	14	77	5,601,500	2.9	15	84	6,053,700	3.3
$ 200,000 - $299,999	11	72	2,645,800	1.4	12	65	2,975,800	1.6
Less than $200,000	12	52	1,497,000	0.7	11	48	1,542,500	0.8

Annual Sales	1944			
	Number of chains	Number of stores	Total Sales	
			Amount	Per cent of total
			$	
All food chains, Total ...	67	1,364	204,852,500	100.0
$1,000,000 and over ...	18	1,061	185,321,900	90.5
$ 500,000 - $999,999.	16	126	10,501,700	5.1
$ 300,000 - $499,999.	13	81	5,048,400	2.5
$ 200,000 - $299,999.	12	62	2,958,500	1.4
Less than $200,000 ...	8	34	1,022,000	0.5

Table 7.-- Food Chain Units Classified by Size of Business, 1943 and 1944

(Grocery, combination and meat market chains combined)

Annual Sales	1943				1944			
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent
		$				$		
All food chains, Total	1,394	185,974,600	100.0	-	1,364	204,852,500	100.0	-
$1,000,000 and over	-	-	-	-	-	-	-	-
$ 500,000 - $999,999 ...	33	20,271,900	10.9	10.9	53	32,521,500	15.9	15.9
$ 300,000 - $499,999 ...	132	49,709,600	26.7	37.6	138	53,696,700	26.2	42.1
$ 200,000 - $299,999 ...	149	36,277,300	19.5	57.1	163	40,334,100	19.7	61.8
$ 100,000 - $199,999 ...	275	39,817,600	21.4	78.5	280	40,500,100	19.8	81.5
$ 50,000 - $ 99,999 ...	353	24,825,200	13.3	91.8	357	25,140,500	12.3	93.8
$ 30,000 - $ 49,999 ...	296	11,853,600	6.4	98.2	260	10,507,700	5.0	98.9
$ 20,000 - $ 29,999 ...	98	2,550,600	1.4	99.6	60	1,569,000	0.8	99.7
$ 10,000 - $ 19,999 ...	36	565,500	0.3	99.9	27	442,500	0.2	99.9
$ 5,000 - $ 9,999 ...	12	81,700	0.1	100.0	14	103,800	0.1	100.0
Less than $5,000	10	21,600			12	36,500		

Table 8.-- Food Chains - Stores and Sales by Provinces and for Cities of 30,000 Population or Over, 1943 and 1944

Province and City	Number of Stores		Value of Sales		
	1943	1944	1943	1944	Per cent of change
CANADA, Total	1,394	1,364	$185,974,600	$204,852,400	+10.7
Places 30,000 and over, total	734	730	114,728,000	127,827,900	+11.4
Places under 30,000, total	660	634	71,256,600	77,024,600	+ 8.1
British Columbia, Total	229	224	21,364,500	22,537,500	+ 5.5
Places 30,000 and over, total	122	125	12,922,200	14,016,300	+ 8.5
Vancouver	111	112	10,704,100	11,612,400	+ 8.5
Victoria	11	13	2,218,100	2,403,900	+ 8.4
Places under 30,000, total	107	99	8,442,300	8,521,200	+ 0.9
Alberta, Total	89	91	9,718,900	10,772,100	+10.8
Places 30,000 and over, total	58	58	6,808,100	7,557,800	+11.0
Calgary	41	40	4,195,100	4,626,700	+10.3
Edmonton	17	18	2,613,000	2,931,100	+12.2
Places under 30,000, total	31	33	2,910,800	3,214,300	+10.4
Saskatchewan, Total	94	90	8,177,600	9,088,300	+11.1
Places 30,000 and over, total	31	30	4,064,400	4,663,400	+14.7
Regina	20	21	(x)	(x)	(x)
Saskatoon	11	9	(x)	(x)	(x)
Places under 30,000, total	63	60	4,113,200	4,424,900	+ 7.6
Manitoba, Total	60	60	9,223,500	9,867,900	+ 7.0
Places 30,000 and over, total	44	44	6,569,300	6,932,300	+ 5.5
Winnipeg	44	44	(x)	(x)	(x)
Places under 30,000, total	16	16	(x)	(x)	(x)
Ontario, Total	654	633	96,692,400	108,121,500	+11.8
Places 30,000 and over, total	344	339	57,186,200	64,425,100	+12.7
Brantford	11	12	1,291,400	1,467,500	+13.6
Fort William	5	5	(x)	(x)	(x)
Hamilton	83	82	7,296,300	7,941,000	+ 8.8
Kingston	4	4	(x)	(x)	(x)
Kitchener	4	4	1,356,200	1,489,900	+ 9.9
London	11	11	2,840,600	3,280,500	+15.5
Ottawa	38	39	6,571,600	7,585,300	+15.4
St. Catherines	10	9	1,986,100	2,094,300	+ 5.4
Sudbury	8	6	1,542,400	1,788,300	+15.9
Toronto	152	154	28,266,300	32,270,500	+14.2
Windsor	18	13	4,215,600	4,421,000	+ 4.9
Places under 30,000, total	310	294	39,506,200	43,696,400	+10.6
Quebec, Total	171	172	31,890,600	34,864,000	+ 9.3
Places 30,000 and over, total	110	113	23,503,100	26,430,900	+12.5
Hull	1	1	(x)	(x)	(x)
Montreal	87	89	18,067,300	20,056,800	+11.0
Quebec	3	3	(x)	(x)	(x)

Table 8.-- Food Chains - Stores and Sales by Provinces and for Cities of 30,000 Population or Over, 1943 and 1944 - (Concl'd)

Province and City	Number of Stores		Value of Sales		
	1943	1944	1943	1944	Per cent of change
Quebec, - (Concl'd)					
Sherbrooke	2	2	(x)	(x)	(x)
Three Rivers	3	3	(x)	(x)	(x)
Verdun	14	15	$2,960,300	$3,229,600	+ 9.1
Places under 30,000, total	61	59	8,387,500	8,433,100	+ 0.5
Maritime Provinces, Total...	97	94	8,907,100	9,601,100	+ 7.8
Places 30,000 and over, total ...	25	21	3,674,700	3,802,000	+ 3.5
Halifax	19	19	(x)	(x)	(x)
Saint John	6	2	(x)	(x)	(x)
Places under 30,000, total	72	73	5,232,400	5,799,100	+10.8

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1944

Grocery Store Chains

B. & K. Economy Stores, Ltd.,	1484 West Broadway	Vancouver, B.C.
Boyle, H. J. Co., Ltd.,	60 Hunter St., E.,	Peterborough, Ont.
Butti, Sam (Carload Groceterias)	268 Ferguson St.,	North Bay, Ont.
Carroll's Ltd.,	19 Hughson St., S.,	Hamilton, Ont.
Cash Foods Ltd.,	10316-107th St.,	Edmonton, Alta.
Curry's Grocery	6115 Fraser St.,	Vancouver, B. C.
Ford's Groceteria	1221 St. James St.,	Montreal, Que.
Gowman, The Grocery	181 Colborne St.,	Brantford, Ont.
Hickman Stores, The	843 Bank St.,	Ottawa, Ont.
Jenkins' Groceteria, Ltd.,	702-9th Ave., W.,	Calgary, Alta.
McBride's, Ltd.,	1333 Garnet St.,	Regina, Sask.
Model Grocery, Ltd.,	308-6th St.,	New Westminster, B.C.
O.K. Economy Stores	301 Ontario Ave.,	Saskatoon, Sask.
Overwaitea, Ltd.,	1181 Richards St.,	Vancouver, B.C.
Pinch, The J. C. Stores	536 Queen St., E.,	Sault Ste. Marie, Ont.
Quality Groceteria Co.,	71 Emerald St., S.,	Hamilton, Ont.
Ray's Superior Stores, Ltd.,	207 West Hastings St.,	Vancouver, B.C.
Robertson, S. M., Ltd.,	Water St.,	Shelburne, N.S.
Steinberg's Wholesale Groceterias, Ltd.,	1430 Overdale	Montreal, Que.
Tait, Harry Groceterias Ltd.,	10012-101st Ave.,	Edmonton, Alta.
Thomson Groceries, Ltd.,	296 Greenwood Ave.,	Toronto, Ont.
Toronto Grocery Stores	290 Queen St., E.,	Toronto, Ont.
Wilbee's Service Stores, Ltd.,	6027 Fraser St.,	Vancouver, B.C.
Ziebell Stores	149 Pembroke St., W.,	Pembroke, Ont.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1944 - (Concl'd)

Combination Store Chains

Acadia Stores, Ltd.,	245 Hollis St.,	Halifax, N.S.
Barker's Stores, Ltd.,	Provost St.,	New Glasgow, N.S.
Bassin's Food Markets	405 Jane St.,	Toronto, Ont.
Carload Grocery (Bertrand Bros.)	634 Notre Dame St.,	Sudbury, Ont.
Cohen, Louis	134 Sterling Road	Glace Bay, N.S.
The Consumers Cooperative Society Ltd.,	64-4th Ave.,	Timmins, Ont.
Cosmopolitan, The Stores	214 Townsend St.,	Sydney, N.S.
Curtis Markets	1028 Pape Ave.,	Toronto, Ont.
David's Market, Ltd.,	106 Townsend St.,	Sydney, N.S.
Dionne Ltee	5005 Blvd. Decarie	Montreal, Que.
Dominion Stores, Ltd.,	3 Sullivan St.,	Toronto, Ont.
Fitzpatrick & Geraghty, Ltd.,	198 Rubidge St.,	Peterborough, Ont.
Five United Markets, Ltd.,	552 Pitt St.,	Windsor, Ont.
Great A. & P. Tea Co., Ltd.,	135 Laughton Ave.,	Toronto, Ont.
International Provision Co., Ltd.,	626 Barrington St.,	Halifax, N. S.
Jewel Stores, Ltd.,	288 Princess St.,	Winnipeg, Man.
Loblaw Groceterias Co., Ltd.,	Fleet & Bathurst Sts.,	Toronto, Ont.
E.F. Mason Stores, The	429 George St.,	Peterborough, Ont.
Powell & Co., Ltd.,	King & Main Sts.,	Dundas, Ont.
Power Food Markets	118 King St. E.,	Toronto, Ont.
Progressive Trading Cooperative Ltd.,	454 King St. W.,	Toronto, Ont.
Ray's Limited	501 Dominion Bank Bldg.,	Vancouver, B.C.
Safeway Stores, Ltd.,	313 Pacific Ave.,	Winnipeg, Man.
Shop-Easy Stores, Ltd.,	204 Confederation Life Bldg.,	Winnipeg, Man.
Shoprite Stores	1502-12th Ave., W.,	Calgary, Alta.
Shore's Chain Stores	Main St.,	Glace Bay, N.S.
J. W. Sobey		Stellarton, N.S.
Thrift Stores, Ltd.,	960 Outremont Ave.,	Montreal, Que.
Welch, H. W., Ltd.,		Fairhaven, N.B.
Whyte Packing Co., The Ltd.,	78 Linton Ave.,	Stratford, Ont.
Workers' Cooperative of New Ontario, Ltd.	64-3rd Ave.,	Timmins, Ont.

Meat Market Chains

Buehler Bros., Ltd.,	2896 Dundas St., W.,	Toronto, Ont.
Burns & Co., Ltd.,		Calgary, Alta.
Calvert - Willis	1232 Dundas St., W.,	Toronto, Ont.
Len Collins, Ltd.,	475 Danforth Ave.,	Toronto, Ont.
Cooper, Joseph, Ltd.,	565 Danforth Ave.,	Toronto, Ont.
Cross' Stores, Ltd.,	1310 Douglas St.,	Victoria, B.C.
Duff's Meat Stores	73 King St.,	Hamilton, Ont.
O.K. Stores, Ltd.,	501 Dominion Bank Bldg.,	Vancouver, B.C.
Poyntz, A.	790 St. Clair Ave., W.,	Toronto, Ont.
Pure Food Meat Markets	203 First Ave.,	Toronto, Ont.
Sterling Food Markets, Ltd.,	18 West Hastings St.,	Vancouver, B.C.
Swanwick, A.	428 King St. W.,	Hamilton, Ont.

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FOOD STORE CHAINS, 1945

There were 62 food chains in Canada operating 1,306 stores in 1945 according to the results of the annual survey of chain stores recently compiled by the Merchandising and Services Statistics of the Dominion Bureau of Statistics. These figures reveal a reduction from 1944 of 5 chains and 58 stores. The total volume of business transacted by chain stores, however, continued to increase, 1945 sales of $218,968,700 being 6.9 per cent above the 1944 sales volume. An increase in average sales per store from $150,185 in 1944 to $167,664 in 1945 indicates a continuation of the trend towards larger volume stores. Food chains include grocery chains, combination grocery and meat chains, and meat market chains. For the purpose of this survey, a chain is an organization operating four or more stores under the same ownership.

The 6.9 per cent increase in dollar volume of business does not necessarily indicate an increase in physical volume of merchandise sold, since the Bureau's Retail Food Index for chain stores rose from 128.0 in 1944 to 130.0 in 1945. Any shift in consumer preference from lower price-range goods to higher priced merchandise would also tend to increase the dollar volume of sales without a proportionate increase in the physical volume of goods sold.

A comparison of the sales increases recorded for chain food stores and for independent food stores suggests almost parallel gains between 1944 and 1945 for these two types of outlets. The gain of 6.9 per cent in chain store sales compares with an increase of 6.5 per cent in sales of independent stores. This latter figure is based on the monthly sales of a continuing number of stores and does not take into account changes in the number of stores. The percentage gain for independents, therefore, does not reflect the effect on sales resulting from any net change in the number of independent stores between the two years.

Increases over 1944 in volume of chain food store sales were general in all regions of the country, ranging from 2.7 to 10.0 per cent. Food chains in the Maritime Provinces registered the smallest increase in sales over last year at 2.7 per cent. The largest gains were reported in Manitoba and Quebec where food chain sales were up 10.0 and 9.5 per cent respectively. Saskatchewan came next with an increase over 1944 of 8.4 per cent followed by a gain of 6.6 per cent for British Columbia, 6.3 per cent for Ontario, and 4.9 per cent for Alberta.

Of the 62 food chains, 29 were combination store chains principally composed of outlets handling both groceries and fresh meats. These 29 chains, however, operated 845 of the 1,306 chain food stores and transacted 81.5 per cent of the total sales

of food chains. Grocery store chains accounted for 15.7 per cent while the remaining 2.8 per cent was made up by meat market chains. All three kinds of stores recorded sharp increases over last year in average sales per store, grocery store sales advancing from $82,436 per store to $94,136; combination store sales, from $193,240 to $211,169; and sales per store for meat markets, from $50,768 to $63,969.

When grouped according to number of units operated, no appreciable change occurred from the previous year in the share of business done by chains falling within the three categories into which chains are classified. Stability also characterized the proportionate distribution of chain sales according to annual sales volumes, the 18 chain companies with sales of over $1,000,000 being responsible for 91.0 per cent of all food chain sales in 1945 and 90.5 per cent in 1944. Average sales per store for this group rose from $174,667 per store in 1944 to $190,875 in 1945.

Individual outlets of chains, however, did shift moderately upward in sales size as shown in Table 7 where they are classified by amount of annual sales. This is a natural result of the increase in average sales per store which causes some stores to move from one group to that next higher. Both the two largest sales size groups, including all chain food stores with sales of over $300,000, showed gains in number of stores as well as in the proportion of total business transacted. Stores with sales of $500,000 or over accounted for 18.5 per cent of all food chain business in 1945 with sales amounting to $40,404,200 as compared with sales of $32,521,500 or 15.9 per cent of the total food chain sales in 1944. All the sales size groups under $300,000 reported a smaller proportion of the total trade than they had secured in 1944; at the same time there was a proportionately greater reduction in the number of stores in most of these smaller size groups.

Table 8 shows comparative figures for the years 1944 and 1945 for cities of 30,000 population and over and for places under 30,000. Canada totals reveal that chain store sales in places of under 30,000 population advanced 9.5 per cent over last year as compared with an increase of 5.3 per cent for cities of over 30,000 population. Cities of over 30,000 population in Eastern Canada generally had smaller increases in dollar volume of sales handled by food chains than places of under 30,000 population. Ontario cities of over 30,000 population registered an increase of only 3.4 per cent over 1944. This was weighted by Toronto where an increase of only 1.1 per cent can be partially explained by a decrease of 18 in the number of food chain stores in 1945. On the other hand, the greater percentage expansion in volume of business in the Western Provinces took place in cities of over 30,000 population.

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Table 1.-- Principal Statistics of Food Store Chains for Selected Years

(Grocery, combination and meat market chains combined)

	1930	1941	1942	1943	1944	1945
Number of chains	87	79	70	69	67	62
Maximum number of stores	2,352	1,707	1,431	1,394	1,364	1,306
Total sales (at retail)	$127,582,500	$177,405,900	$193,488,500	$185,974,600	$204,852,500	$218,968,700
Chain sales index (1930=100) .	100.0	139.1	151.7	145.8	160.6	171.6
Per cent change in sales from preceding year	-	+22.2	+ 9.1	- 3.9	+10.2	+ 6.9

Table 2.-- Principal Statistics of Food Store Chains by Provinces

(Grocery, combination and meat market chains combined)

		1930	1941	1944	1945	Per cent change in sales 1944-1945
CANADA, TOTAL	Chains ...	87	79	67	62	
	Stores ...	2,352	1,707	1,364	1,306	
	Sales	$127,582,500	$177,405,900	$204,852,500	$218,968,700	+ 6.9
British Columbia (1)	Chains ...	19	14	12	11	
	Stores ...	246	282	224	206	
	Sales	$10,194,900	$18,765,300	$22,537,500	$24,025,700	+ 6.6
Alberta	Chains ...	8	8	7	6	
	Stores ...	120	103	91	86	
	Sales	$5,587,000	$7,932,100	$10,772,100	$11,303,600	+ 4.9

Table 2.-- Principal Statistics of Food Store Chains by Provinces - (Concl'd.)

(Grocery, combination and meat market chains combined)

		1930	1941	1944	1945	Per cent change in sales 1944-1945
Saskatchewan	Chains ...	10	4	3	3	
	Stores ...	165	111	90	89	
	Sales	$6,969,300	$6,794,100	$9,088,300	$9,849,100	+ 8.4
Manitoba	Chains ...	8	4	3	3	
	Stores ...	121	85	60	60	
	Sales	$5,689,100	$8,247,500	$9,867,900	$10,847,400	+10.0
Ontario	Chains ...	37	41	36	33	
	Stores ...	1,107	790	633	609	
	Sales	$70,769,300	$99,318,600	$108,121,500	$114,916,900	+ 6.3
Quebec	Chains ...	13	7	6	7	
	Stores ...	495	214	172	166	
	Sales	$23,708,400	$28,477,200	$34,864,000	$38,164,500	+ 9.5
Maritime Provinces	Chains ...	12	14	11	10	
	Stores ...	98	122	94	90	
	Sales	$4,664,500	$7,871,100	$9,601,200	$9,861,500	+ 2.7

(1) Includes Yukon and Northwest Territories.

Table 3.-- Principal Statistics of Food Store Chains Classified by Kind of Business, 1930, and 1941-1945

	All food store chains	Grocery store chains	Combination store chains	Meat market chains
1930 - No. of chains	87	43	23	21
No. of stores (maximum)	2,352	748	1,379	225
Value of chain sales	$127,582,500	$44,698,400	$74,800,200	$8,083,900
Per cent of all food chain sales	100.0	35.0	58.6	6.4
Average sales per store	$54,244	$59,757	$54,242	$35,929
1941 - No. of chains	79	28	34	17
No. of stores (maximum)	1,707	448	1,093	166
Value of chain sales	$177,405,900	$26,523,300	$145,794,100	$5,088,500
Per cent of all food chain sales	100.0	14.9	82.2	2.9
Average sales per store	$103,928	$59,204	$133,388	$30,653
1942 - No. of chains	70	24	32	14
No. of stores (maximum)	1,431	394	899	138
Value of chain sales	$193,488,500	$29,330,600	$158,785,700	$5,372,200
Per cent of all food chain sales	100.0	15.2	82.1	2.7
Average sales per store	$135,212	$74,443	$176,625	$38,929
1943 - No. of chains	69	24	32	13
No. of stores (maximum)	1,394	386	883	125
Value of chain sales	$185,974,600	$29,497,700	$150,335,800	$6,141,100
Per cent of all food chain sales	100.0	15.9	80.8	3.3
Average sales per store	$133,411	$76,419	$170,256	$49,129
1944 - No. of chains	67	24	31	12
No. of stores (maximum)	1,364	377	868	119
Value of chain sales	$204,852,500	$31,078,400	$167,732,700	$6,041,400
Per cent of all food chain sales	100.0	15.2	81.9	2.9
Average sales per store	$150,185	$82,436	$193,240	$50,768
1945 - No. of chains	62	23	29	10
No. of stores (maximum)	1,306	366	845	95
Value of chain sales	$218,968,700	$34,453,600	$178,438,000	$6,077,100
Per cent of all food chain sales	100.0	15.7	81.5	2.8
Average sales per store	$167,664	$94,136	$211,169	$63,969

Table 4.-- Kinds of Stores Operated by Combination Store Chains, 1943, 1944, 1945

	Number of chains	Total units		Grocery units		Combination units	
		Number	Sales	Number	Sales	Number	Sales
			$		$		$
1943							
All combination store chains, total	32	(1) 883	150,335,800	253	18,841,100	623	131,150,900
Less than 10 units	24	(1) 134	13,330,100	23	1,239,500	104	11,746,800
10-99 units	4	109	10,961,800	37	2,245,500	72	8,716,300
100 units and over	4	640	126,043,900	193	15,356,100	447	110,687,800
1944							
All combination store chains, total	31	(2) 868	167,732,700	250	21,633,500	614	145,838,400
Less than 10 units	23	(2) 127	13,371,400	25	1,374,900	98	11,735,700
10-99 units	4	109	11,533,600	36	2,368,900	73	9,164,700
100 units and over	4	632	142,827,700	189	17,889,700	443	124,938,000
1945							
All combination store chains, total	29	(3) 845	178,438,000	237	22,752,700	604	155,402,900
Less than 10 units	22	(3) 125	15,194,800	21	1,323,200	100	13,589,200
10-99 units	3	94	10,826,400	32	2,025,500	62	8,800,900
100 units and over	4	626	152,416,800	184	19,404,000	442	133,012,800

(1) Includes 7 stores with sales of $343,800 which cannot be classified as either grocery or combination stores.
(2) Includes 4 stores with sales of $260,800 which cannot be classified as either grocery or combination stores.
(3) Includes 4 stores with sales of $282,400 which cannot be classified as either grocery or combination stores.

Table 5.-- Food Store Chains Classified According to Number of Stores Operated, 1941, 1943-1945

(Grocery, combination and meat market chains combined)

Number of units	1941				1943			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	79	1,707	177,405,900	100.0	69	1,394	185,974,600	100.0
Less than 10 units	56	318	21,331,200	12.0	48	261	20,575,700	11.1
10-99 units	19	602	34,103,000	19.2	17	493	39,355,000	21.2
100 units and over	4	787	121,971,700	68.8	4	640	126,043,900	67.7

Number of units	1944				1945			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	67	1,364	204,852,500	100.0	62	1,306	218,968,700	100.0
Less than 10 units	46	245	20,360,600	10.0	43	232	22,235,900	10.2
10-99 units	17	487	41,664,200	20.3	15	448	44,316,000	20.2
100 units and over	4	632	142,827,700	69.7	4	626	152,416,800	69.6

Table 6.-- Food Store Chains Classified According to Amount of Annual Sales, 1941, and 1943-1945

(Grocery, combination and meat market chains combined)

Annual sales	1941				1943			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	79	1,707	177,405,900	100.0	69	1,394	185,974,600	100.0
$1,000,000 and over	14	1,154	152,322,200	85.8	19	1,083	167,058,600	89.8
$ 500,000 - $999,999	21	285	14,859,600	8.4	12	114	8,344,000	4.5
$ 300,000 - $499,999	13	96	5,061,700	2.9	15	84	6,053,700	3.3
$ 200,000 - $299,999	13	86	3,059,900	1.7	12	65	2,975,800	1.6
Less than $200,000	18	86	2,102,500	1.2	11	48	1,542,500	0.8

Annual Sales	1944				1945			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	67	1,364	204,852,500	100.0	62	1,306	218,968,700	100.0
$1,000,000 and over	18	1,061	185,321,900	90.5	18	1,044	199,273,300	91.0
$ 500,000 - $999,999	16	126	10,501,700	5.1	15	122	11,154,500	5.1
$ 300,000 - $499,999	13	81	5,048,400	2.5	11	55	4,612,500	2.1
$ 200,000 - $299,999	12	62	2,958,500	1.4	12	58	3,098,800	1.4
Less than $200,000	8	34	1,022,000	0.5	6	27	829,600	0.4

Table 7.-- Food Store Chain Units Classified by Size of Business, 1944 and 1945

(Grocery, combination and meat market chains combined)

Annual sales	1944				1945			
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent
		$				$		
All food chains, Total	1,364	204,852,500	100.0	-	1,306	218,968,700	100.0	-
$500,000 and over	53	32,521,500	15.9	15.9	62	40,404,200	18.5	18.5
$300,000 - $499,999	138	53,696,700	26.2	42.1	158	61,651,200	28.1	46.6
$200,000 - $299,999	163	40,334,100	19.7	61.8	171	42,195,000	19.3	65.9
$100,000 - $199,999	280	40,500,100	19.8	81.5	276	39,770,500	18.2	84.1
$ 50,000 - $ 99,999	357	25,140,500	12.3	93.8	357	25,065,000	11.4	95.5
$ 30,000 - $ 49,999	260	10,507,700	5.0	98.9	204	8,351,800	3.8	99.3
$ 20,000 - $ 29,999	60	1,569,000	0.8	99.7	47	1,213,300	0.6	99.9
$ 10,000 - $ 19,999	27	442,500	0.2	99.9	19	259,600	0.1	100.0
$ 5,000 - $ 9,999	14	103,800)	0.1	100.0	5	42,000)	(1)	(1)
Less than $5,000	12	36,500)			7	16,100)		

(1) Less than 0.05 per cent.

Table 8.-- Food Store Chains - Stores and Sales by Provinces and for Cities of 30,000 Population and Over, 1944 and 1945

Province and City	Number of stores		Value of sales		Per cent change
	1944	1945	1944 (1)	1945	
CANADA, Total	1,364	1,306	$204,852,400	$218,968,700	+ 6.9
Places 30,000 and over, total	726	701	127,334,400	134,094,900	+ 5.3
Places under 30,000, total	638	605	77,518,000	84,873,800	+ 9.5
British Columbia, Total	224	206	22,537,500	24,025,700	+ 6.6
Places 30,000 and over, total	123	124	13,812,800	15,039,600	+ 8.9
Vancouver	112	113	11,612,400	12,665,600	+ 9.1
Victoria	11	11	2,200,400	2,374,000	+ 7.9
Places under 30,000, total	101	82	8,724,700	8,986,100	+ 3.0
Alberta, Total	91	86	10,772,100	11,303,600	+ 4.9
Places 30,000 and over, total	58	58	7,557,800	7,993,400	+ 5.8
Calgary	40	40	4,626,700	4,855,100	+ 4.9
Edmonton	18	18	2,931,100	3,138,300	+ 7.1
Places under 30,000, total	33	28	3,214,300	3,310,200	+ 3.0
Saskatchewan, Total	90	89	9,088,300	9,849,100	+ 8.4
Places 30,000 and over, total	29	29	4,413,200	4,861,300	+10.2
Regina	20	20	(x)	(x)	(x)
Saskatoon	9	9	(x)	(x)	(x)
Places under 30,000, total	61	60	4,675,100	4,987,800	+ 6.7
Manitoba, Total	60	60	9,867,900	10,847,400	+ 9.9
Places 30,000 and over, total	44	44	(x)	(x)	(x)
Winnipeg	44	44	(x)	(x)	(x)
Places under 30,000, total	16	16	(x)	(x)	(x)
Ontario, Total	633	609	108,121,500	114,829,600	+ 6.2
Places 30,000 and over, total	338	318	64,385,400	66,568,600	+ 3.2
Brantford	11	11	1,427,800	1,573,200	+10.2
Fort William	5	7	(x)	(x)	(x)
Hamilton	82	81	7,941,000	8,279,900	+ 4.3
Kingston	4	4	(x)	(x)	(x)
Kitchener	4	4	1,489,900	1,623,400	+ 9.0
London	11	11	3,280,500	3,405,100	+ 3.8
Ottawa	39	37	7,585,300	7,785,700	+ 2.6
St. Catharines	9	8	2,094,300	2,201,300	+ 5.1
Sudbury	6	6	1,788,300	1,822,000	+ 1.9
Toronto	154	136	32,270,500	32,617,700	+ 1.1
Windsor	13	13	4,421,000	4,638,700	+ 4.9
Places under 30,000, total	295	291	43,736,100	48,261,000	+10.3

(1) In some instances figures for 1944 have been revised.
(x) Indicates figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 8.-- Food Store Chains - Stores and Sales by Provinces and for Cities of 30,000 Population and Over, 1944 and 1945 (Concl'd.)

Province and City	Number of stores		Value of sales		Per cent change
	1944	1945	1944 (1)	1945	
Quebec, Total	172	166	$34,864,000	$38,251,800	+ 9.7
Places 30,000 and over, total	113	108	26,430,900	28,309,500	+ 7.1
Hull	1	1	(x)	(x)	(x)
Montreal	89	84	20,056,800	21,305,200	+ 6.2
Quebec	3	3	(x)	(x)	(x)
Sherbrooke	2	2	(x)	(x)	(x)
Three Rivers	3	3	(x)	(x)	(x)
Verdun	15	15	3,229,600	3,531,400	+ 9.3
Places under 30,000, total	59	58	8,433,100	9,942,300	+17.9
Maritime Provinces, Total	94	90	9,601,100	9,861,500	+ 2.7
Places 30,000 and over, total	21	20	3,802,000	3,883,400	+ 2.1
Halifax	19	18	(x)	(x)	(x)
Saint John	2	2	(x)	(x)	(x)
Places under 30,000, total	73	70	5,799,100	5,978,100	+ 3.1

(1) In some instances figures for 1944 have been revised.
(x) Indicates figures are withheld to avoid disclosing individual operations, but these are included in the totals.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1945

Grocery Store Chains

B. & K. Economy Stores, Ltd.,	1490 West Broadway,	Vancouver, B.C.
Butti, Mrs. A. (Carload Groceterias)	268 Ferguson St.,	North Bay, Ont.
Carroll's Ltd.,	19 Hughson St., S.,	Hamilton, Ont.
Cash Foods Ltd.,	10316-107th St.,	Edmonton, Alta.
Curry's Grocery Ltd.,	6115 Fraser St.,	Vancouver, B.C.
Ford's Groceterias Co., Ltd.,	1221 St. James St.,	Montreal, P.Q.
Gowman Grocery, The	181 Colborne St.,	Brantford, Ont.
Hickman Stores, The	843 Bank St.,	Ottawa, Ontario.
Jenkins' Groceteria Ltd.,	702-9th Ave., W.,	Calgary, Alta.
Model Grocery Ltd.,	308-6th St.,	New Westminster, B. C.
C.K. Economy Stores,	301 Ontario Ave.,	Saskatoon, Sask.
Overwaitea Ltd.,	1181 Richards St.,	Vancouver, B.C.
Pinch Stores, The J.C.	536 Queen St., E.,	Sault Ste. Marie, Ont.
Pollock Wholesale Ltd., Sam, (Quality Groceteria)	71 Emerald St., S.,	Hamilton, Ont.
Ray's Superior Stores Ltd.,	207 West Hastings St.,	Vancouver, B.C.
Robertson, Ltd., S.M.,	Water St.,	Shelburne, N.S.
Steinberg's Wholesale Groceterias Ltd.,	5400 Hochelaga St.,	Montreal, P.Q.
Tait Groceterias Ltd., Harry	10012-101st Ave.,	Edmonton, Alta.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1945 (Concl'd.)

Grocery Store Chains (Cont'd.)

Thomson Groceries Ltd.,	296 Greenwood Ave.,	Toronto, Ont.
Toronto Grocery Stores,	290 Queen St., E.,	Toronto, Ont.
Wilbee's Service Stores Ltd.,	6027 Fraser St.,	Vancouver, B.C.
Ziebell Stores,	149 Pembroke St., W.,	Pembroke, Ont.

Combination Store Chains

Acadia Stores Ltd.,	245 Hollis St.,	Halifax, N.S.
Barker's Stores Ltd.,	King St.,	Stellarton, N.S.
Carload Grocery (Bertrand Bros.)	634 Notre Dame St.,	Sudbury, Ont.
Cohen, Louis	134 Sterling Road,	Glace Bay, N.S.
Consumers Co-operative Society Ltd., The	114 Algonquin Blvd.,	Timmins, Ont.
Cosmopolitan Stores, The	214 Townsend St.,	Sydney, N.S.
Curtis Markets,	1028 Pape Ave.,	Toronto, Ont.
David's Market Ltd.,	106 Townsend St.,	Sydney, N.S.
Dionne Ltee.,	1221 St. Catherine St., W.,	Montreal, P.Q.
Dominion Stores Ltd.,	3 Sullivan St.,	Toronto, Ont.
Eaton Co. Ltd., The T.		Toronto, Ont.
Fitzpatrick & Geraghty Ltd.,	198 Rubidge St.,	Peterborough, Ont.
Five United Markets Ltd.,	552 Pitt St., W.,	Windsor, Ont.
Great A. & P. Tea Co. Ltd.	135 Laughton Ave.,	Toronto, Ont.
International Provision Co. Ltd.	626 Barrington St.,	Halifax, N.S.
Jewel Stores Ltd.,	288 Princess St.,	Winnipeg, Man.
Loblaw Groceterias Co. Ltd.,	Fleet & Bathurst Sts.,	Toronto, Ont.
Mason Stores, E.F.	429 George St.,	Peterborough, Ont.
Powell & Co. Ltd.,	King & Main Sts.,	Dundas, Ont.
Power Food Markets,	118 King St., E.,	Toronto, Ont.
Ray's Limited,	501 Dominion Bank Bldg.	Vancouver, B.C.
Safeway Stores Ltd.,	Box 660, Oakland,	California, U.S.A.
Shop-Easy Stores Ltd.,	204 Confederation Life Bldg.,	Winnipeg, Man.
Shoprite Stores,	1502-12th Ave., W.,	Calgary, Alta.
Shore's Chain Stores,	Main St.,	Glace Bay, N.S.
Sobey, J.W.	Main St.,	Stellarton, N.S.
Thrift Stores, Ltd.,	960 Outremont Ave.,	Montreal, P.Q.
Whyte Packing Co. Ltd., The	78 Linton Ave.,	Stratford, Ont.
Workers' Co-operative of New Ontario, Ltd.,	64-3rd Ave.,	Timmins, Ont.

Meat Market Chains

Buehler Bros. Ltd.,	2896 Dundas St., W.,	Toronto, Ont.
Collins Ltd., Len	475 Danforth Ave.,	Toronto, Ont.
Cooper Ltd., Joseph	565 Danforth Ave.,	Toronto, Ont.
Cross' Stores Ltd.,	1310 Douglas St.,	Victoria, B.C.
Duff's Meat Stores,	73 King St.,	Hamilton, Ont.
O.K. Stores, Ltd.,	501 Dominion Bank Bldg.,	Vancouver, B.C.
Poyntz, A.	790 St. Clair Ave., West,	Toronto, Ont.
Pure Food Meat Markets	203 First Ave.,	Toronto, Ont.
Sterling Food Markets Ltd.,	18 West Hastings St.,	Vancouver, B.C.
Swanwick, A.	428 King St., W.,	Hamilton, Ont.

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Minister of Trade and Commerce

CANADA

DEPARTMENT OF TRADE AND COMMERCE

DOMINION BUREAU OF STATISTICS

MERCHANDISING AND SERVICES STATISTICS

RETAIL FOOD STORE CHAINS

COMPRISING

GROCERY STORES

COMBINATION STORES

MEAT MARKETS

1946

OTTAWA

December 1947 Price 25 cents

RETAIL FOOD STORE CHAINS

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DEFINITIONS

Chains

For the purpose of this survey, a retail chain is an organization operating four or more retail stores under the same ownership.

Chain classification

A chain is classified according to the kind of business carried on by the majority of its stores. The chains included in this report are the three principal types of food stores - grocery, combination grocery and meat, and meat markets. Due to the broader chain classification it follows that some combination type chains may operate some strictly grocery stores. In a few instances food chains operate stores entirely outside of the food classification, such as a general store.

Stores - average

The average number of stores operated is obtained by averaging the number in operation at January 1st, June 30 and December 31st.

Maximum

The maximum number is the total number of stores operated throughout the year, whether continuous or part year.

Sales

Net retail sales are gross sales less any returns or allowances. Sales at wholesale are not included.

Salaries and Wages

Salaries and wages shown in this report are those paid to store employees only as comparable to store sales. Salaries and wages paid to head office and warehouse employees are not included.

Accounts Outstanding

This represents the amounts owing on charge, instalment or open accounts at the end of the year. It does not include any accounts written off.

Stocks

The inventory of stocks on hand at the end of the year in both stores and warehouses is at cost or invoice value.

DOMINION BUREAU OF STATISTICS

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RETAIL FOOD STORE CHAINS, 1946

Introduction

The Dominion Bureau of Statistics conducts an annual survey on the operation of retail chains of which retail food store chains form a part. The results of this survey yield figures on retail chain food store sales, salaries and wages paid to store employees, accounts outstanding at the end of the year and store and warehouse inventories at the end of the year. Reports are received from all known firms coming within the definition of a chain giving this study a complete coverage. While forming part of a general report on retail chains, information on retail food stores in the chain category is presented here in considerably more detail than in the comprehensive report on chain stores, "Retail Chains in Canada, 1946". This latter bulletin will be made available shortly. As explained in the definitions, the food chains whose results comprise this report are the three major food classifications of grocery stores, combination stores and meat markets.

Summary

1. Stores and sales in 1946

In 1946 there were 65 retail food chains in Canada operating 1,289 stores which sold merchandise to the value of $245,278,100. Although there was a reduction of 36 in the number of stores from the previous year, the dollar volume of retail sales increased 11.3 per cent. The average sales per store continued on an upward trend with sales of $194,357, a figure 15 per cent greater than the 1945 average. (See table 1).

2. Comparison with previous years

Table 1, depicts the growth of chain stores in the field of food retailing since 1930, the first year in which the survey was conducted. Comparison in the trends of the total dollar volume of sales, salaries and inventories is shown in chart AC-1 while the trends in average store sales, salaries and stocks have been plotted in chart AC-2. The steady shrinkage of chain store units, coupled with the gain in dollar volume has greatly increased the 1946 store averages from earlier years.

Average sales per store more than quadrupled from the 1933 low level to $194,357 in 1946. Outstanding accounts declined steadily from 1938 to 1945 but gained somewhat in 1946. A significant rise occurred in the dollar value of store and warehouse stocks at the end of 1946.

3. Provincial comparison

Increases in sales volume were general in all regions of the country, ranging from 18.4 per cent in Manitoba to 0.3 per cent in Saskatchewan. The shifting from or to the chain category is evident in the

number of chains and stores tabulated in the different years, and is a significant factor in the varying percentage increase from the previous year. (See table 2).

4. Food chains classed by number of units

One chain firm increased its number of units sufficiently since 1945 to place it in the largest category of 100 units or over. The slight increase in the percentage of the business transacted by that group of chains is no doubt partially due to this movement. (See table 3).

5. Chains classed by amount of annual sales

Two chain companies moved up to the $1,000,000 and over class thereby raising the proportionate distribution of sales for that group from 90.4 per cent in 1945 to 91.7 per cent in 1946. A general upward shifting in the sales volume of food chains is reflected in the greater number of firms in the higher sales volume categories. (See table 4).

6. Individual stores classed by size

The trend toward increased average sales is further substantiated when the units are classed by size of business. In 1946 there were 34 more stores in the $500,000 and over class than in 1945, bringing the proportion of business done by that group from 18.3 per cent in 1945 to 25.5 per cent in 1946. A general upward movement is evident in all size ranges. (See table 5).

7. Sales by localities

In 1946, localities of 30,000 population and over secured a slightly greater proportion of the 11.3 per cent increase over 1945 than did places under 30,000. In Ontario, however, chain stores registered a smaller increase in the cities than in the rest of the province. In one Ontario city a chain was dropped from this study because the number of stores operated was reduced to less than 4, (see definition of a chain, page 2). Localities under 30,000 population in Saskatchewan also registered a decline in 1946 due to the loss of a chain organization from this tabulation. (See table 6).

Kind of business composition

The 65 chain firms whose results make this report constitute 29 combination type chains which transacted 81.8 per cent of the 1946 business in food chains; 23 grocery chains which accounted for 15.1 per cent; and 13 meat market chains which did 3.1 per cent. This percentage distribution varied slightly from 1945 and was almost identical with the 1944 ratios. (See table 7).

The individual units operated by the combination and grocery chains were as follows:

	Total units		Grocery units		Combination units	
	No.	Sales	No.	Sales	No.	Sales
		$		$		$
Grocery chains	339(1)	37,018,200	316	25,644,100	21	11,205,200
Combination chains.	838(2)	200,659,100	223	25,399,700	610	174,920,800

(1) Includes 2 stores with $68,900 sales not classed as grocery or combination.

(2) Includes 5 stores with $338,600 sales not classed as grocery or combination.

CHART AC-1

RETAIL FOOD CHAIN STORES

TOTAL SALES, SALARIES, STORE AND WAREHOUSE STOCKS

1930–1946

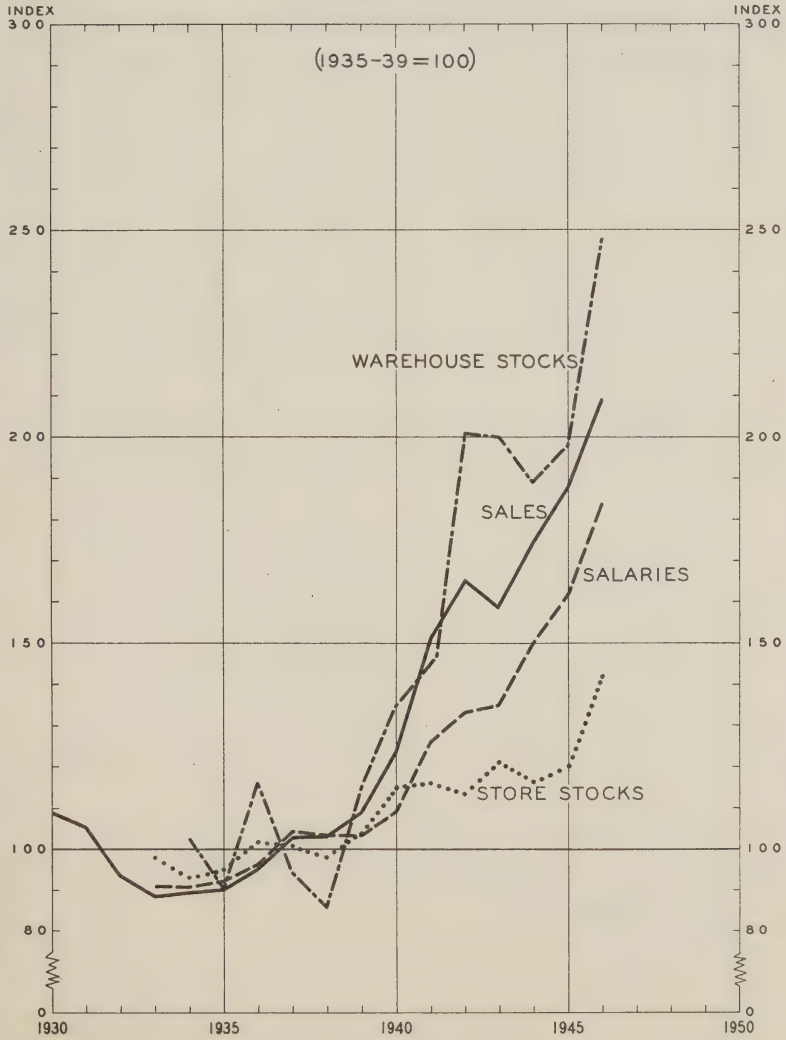

CHART AC-2

RETAIL FOOD CHAIN STORES

AVERAGE SALES, SALARIES AND STOCKS PER STORE

1930—1946

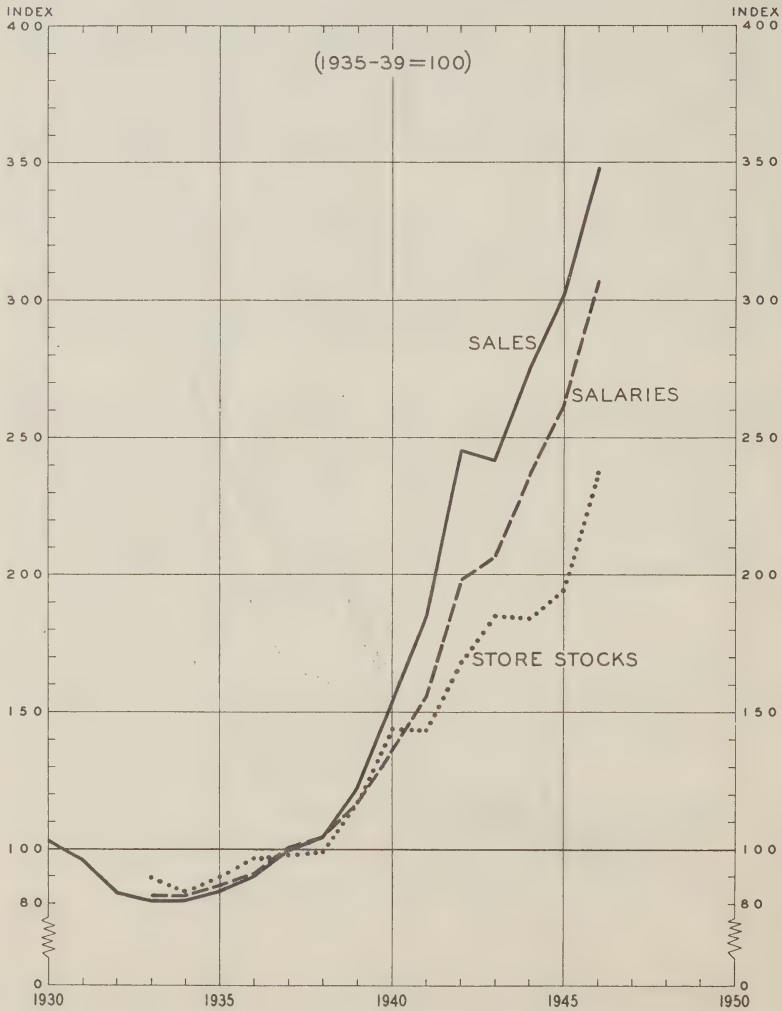

Table 1.--Summary of Food Store Chains, 1930-1946

Year	Number of Chains	Number of Stores		Retail Sales		Salaries and Wages to Store Employees	Accounts Outstanding End of Year	Stocks on Hand End of Year	
		Average(1)	Maximum	Amount	Average per Store			Stores	Warehouses
				$	$	$	$	$	$
1930 ..	87	2,218	2,352	127,582,500	57,521	9,801,400	(a)	6,468,600	(a)
1931 ..	90	2,310	2,410	123,753,000	53,573	(a)	(a)	(a)	(a)
1932 ..	90	2,347	2,436	109,814,400	46,789	(a)	(a)	(a)	(a)
1933 ..	91	2,301	2,398	103,638,500	45,041	7,976,000	(a)	6,221,500	(a)
1934 ..	86	2,310	2,395	104,912,800	45,417	7,958,200	(a)	5,894,500	4,011,700
1935 ..	86	2,241	2,309	105,635,900	47,138	8,094,500	1,172,300	6,046,900	3,530,600
1936 ..	89	2,229	2,334	111,511,900	50,028	8,441,900	1,261,300	6,474,300	4,534,000
1937 ..	89	2,179	2,287	121,054,800	55,555	9,138,800	1,351,900	6,435,000	3,679,400
1938 ..	91	2,093	2,212	121,371,500	57,989	9,080,800	1,601,400	6,238,100	3,349,000
1939 ..	87	1,867	2,044	127,945,900	68,530	9,072,300	1,473,500	6,604,900	4,485,700
1940 ..	82	1,684	1,817	145,193,900	86,220	9,545,900	1,366,600	7,322,100	5,276,300
1941 ..	79	1,692	1,707	177,405,900	103,928	11,056,400	1,088,000	7,386,800	5,758,900
1942 ..	70	1,416	1,431	193,488,500	136,644	11,664,800	(a)	7,168,300	7,881,200
1943 ..	69	1,378	1,394	185,974,600	134,960	11,833,800	740,200	7,669,300	7,843,300
1944 ..	67	1,335	1,364	204,852,500	153,448	13,134,300	733,200	7,393,000	7,397,700
1945 ..	66	1,304	1,325	220,285,300	168,930	14,191,200	708,600	7,631,600	7,744,900
1946 ..	65	1,262	1,289	245,278,100	194,357	16,108,800	764,700	9,017,600	9,705,300

(1) Obtained by averaging the number at the beginning, middle and end of year.
(a) Not available.

Table 2.--Principal Statistics of Food Store Chains by Provinces

(Grocery, combination and meat market chains combined)

		1930	1941	1945(1)	1946	Per cent change in sales 1945-1946
CANADA, TOTAL	Chains ...	87	79	66	65	
	Stores ...	2,352	1,707	1,325	1,289	
	Sales	$127,582,500	$177,405,900	$220,285,300	$245,278,100	+11.3
(2) British Columbia	Chains ...	19	14	13	13	
	Stores ...	246	282	217	220	
	Sales	$10,194,900	$18,765,300	$ 24,563,400	$ 28,037,600	+14.1
Alberta	Chains ...	8	8	6	4	
	Stores ...	120	103	86	78	
	Sales	$ 5,587,000	$ 7,932,100	$ 11,303,600	$ 12,027,700	+ 6.4
Saskatchewan	Chains ...	10	4	3	6	
	Stores ...	165	111	89	77	
	Sales	$ 6,969,300	$ 6,794,100	$ 9,849,100	$ 9,874,700	+ 0.3
Manitoba	Chains ...	8	4	4	4	
	Stores ...	121	85	61	62	
	Sales	$ 5,689,100	$ 8,247,500	$ 11,161,200	$ 13,220,200	+18.4
Ontario	Chains ...	37	41	35	34	
	Stores ...	1,107	790	616	601	
	Sales	$70,769,300	$99,318,600	$115,294,700	$128,608,200	+11.5
Quebec	Chains ...	13	7	7	7	
	Stores ...	495	214	166	161	
	Sales	$23,708,400	$28,477,200	$ 38,251,800	$ 43,476,300	+13.7
Maritime Provinces	Chains ...	12	14	10	10	
	Stores ...	98	122	90	90	
	Sales	$ 4,664,500	$ 7,871,100	$ 9,861,500	$ 10,033,400	+ 1.7

(1) In some instances figures for 1945 have been revised.
(2) Includes Yukon and Northwest Territories.

Table 3.--Food Store Chains Classified According to Number of Stores Operated, 1941, 1944-1946

(Grocery, combination and meat market chains combined)

Number of units	1941				1944			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	79	1,707	177,405,900	100.0	67	1,364	204,852,500	100.0
Less than 10 units	56	318	21,331,200	12.0	46	245	20,360,600	10.0
10-99 units	19	602	34,103,000	19.2	17	487	41,664,200	20.3
100 units and over	4	787	121,971,700	68.8	4	632	142,827,700	69.7

Number of units	1945(1)				1946			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	66	1,325	220,285,300	100.0	65	1,289	245,278,100	100.0
Less than 10 units	47	251	23,552,500	10.7	46	247	25,214,100	10.3
10-99 units	15	448	44,316,000	20.1	14	393	46,249,900	18.9
100 units and over	4	626	152,416,800	69.2	5	649	173,814,100	70.8

(1) Revised.

Table 4.--Food Store Chains Classified According to Amount of Annual Sales, 1941, and 1944-1946

(Grocery, combination and meat market chains combined)

Annual sales	1941				1944			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	79	1,707	177,405,900	100.0	67	1,364	204,852,500	100.0
$1,000,000 and over	14	1,154	152,322,200	85.8	18	1,061	185,321,900	90.5
$ 500,000 - $999,999	21	285	14,859,600	8.4	16	126	10,501,700	5.1
$ 300,000 - $499,999	13	96	5,061,700	2.9	13	81	5,048,400	2.5
$ 200,000 - $299,999	13	86	3,059,900	1.7	12	62	2,958,500	1.4
Less than $200,000	18	86	2,102,500	1.2	8	34	1,022,000	0.5

Annual sales	1945(1)				1946			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	66	1,325	220,285,300	100.0	65	1,289	245,278,100	100.0
$1,000,000 and over	18	1,044	199,273,300	90.4	20	1,015	225,039,700	91.7
$ 500,000 - $999,999	16	126	11,719,900	5.3	18	139	12,638,800	5.2
$ 300,000 - $499,999	12	61	4,977,500	2.3	13	73	4,978,200	2.0
$ 200,000 - $299,999	13	62	3,312,300	1.5	5	24	1,241,700	0.5
Less than $200,000	7	32	1,002,300	0.5	9	38	1,379,700	0.6

(1) Revised.

Table 5.--Food Store Chain Units Classified by Size of Business, 1945 and 1946

(Grocery, combination and meat market chains combined)

Annual sales	1945(1)				1946			
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent
		$				$		
All food chains, Total	1,325	220,285,300	100.0	-	1,289	245,278,100	100.0	-
$500,000 and over	62	40,404,200	18.3	18.3	96	62,521,000	25.5	25.5
$300,000 - $499,999	158	61,651,200	28.0	46.3	175	67,356,900	27.4	52.9
$200,000 - $299,999	171	42,195,000	19.2	65.5	171	42,372,700	17.3	70.2
$100,000 - $199,999	279	40,255,100	18.3	83.8	273	39,475,600	16.1	86.3
$ 50,000 - $ 99,999	367	25,748,000	11.7	95.5	376	26,341,600	10.8	97.1
$ 30,000 - $ 49,999	206	8,429,000	3.8	99.3	147	6,095,200	2.5	99.6
$ 20,000 - $ 29,999	49	1,262,000	0.6	99.9	30	793,100	0.3	99.9
$ 10,000 - $ 19,999	20	277,700	0.1	100.0	12	174,700	0.1	100.0
$ 5,000 - $ 9,999	6	47,000	(2)	-	7	52,200	(2)	-
Less than $5,000	7	16,100		-	2	5,100		-

(1) Revised.
(2) Less than 0.05 per cent.
Note - Small size units may represent stores operated part year.

Table 6.--Food Store Chains - Stores and Sales by Provinces and for Cities of 30,000 Population and Over, 1945 and 1946

Province and City	Number of stores		Value of sales		Per cent change
	1945	1946	1945 (1)	1946	
			$	$	
CANADA, Total	1,325	1,289	220,285,300	245,278,100	+11.3
Places 30,000 and over, total	718	702	135,473,400	151,290,800	+11.9
Places under 30,000, total	607	587	84,811,900	93,987,300	+10.5
British Columbia, Total	217	220	24,563,400	28,037,600	+14.1
Places 30,000 and over, total	134	137	15,559,200	17,813,100	+14.5
Vancouver	123	126	13,185,200	15,168,100	+15.0
Victoria	11	11	2,374,000	2,645,000	+11.4
Places under 30,000, total	83	83	9,004,200	10,224,500	+13.6
Alberta, Total	86	78	11,303,600	12,027,700	+ 6.4
Places 30,000 and over, total	58	51	7,993,400	8,502,600	+ 6.4
Calgary	40	38	4,855,100	5,374,900	+10.7
Edmonton	18	13	3,138,300	3,127,700	- 0.3
Places under 30,000, total	28	27	3,310,200	3,525,100	+ 6.5
Saskatchewan, Total	89	77	9,849,100	9,874,700	+ 0.3
Places 30,000 and over, total	29	29	4,861,300	5,045,200	+ 3.8
Regina	20	19	(x)	(x)	
Saskatoon	9	10	(x)	(x)	
Places under 30,000, total	60	48	4,987,800	4,829,500	- 3.2
Manitoba, Total	61	62	11,161,200	13,220,200	+18.4
Places 30,000 and over, total	44	45	7,668,800	9,248,100	+20.6
Winnipeg	44	45	7,668,800	9,248,100	+20.6
Places under 30,000, total	17	17	3,492,400	3,972,100	+13.7
Ontario, Total	616	601	115,294,700	128,608,200	+11.5
Places 30,000 and over, total	325	314	67,197,800	74,343,300	+10.6
Brantford	11	11	1,573,200	1,654,700	+ 5.2
Fort William	7	7	1,146,300	1,277,700	+11.5
Hamilton	81	78	8,279,900	8,835,600	+ 6.7
Kingston	4	4	1,475,300	1,556,300	+ 5.5
Kitchener	4	4	1,623,400	1,831,200	+12.8
London	11	11	3,405,100	3,714,100	+ 9.1
Ottawa	37	35	7,785,700	8,743,300	+12.3
St. Catharines	11	11	2,617,000	2,897,300	+10.7
Sudbury	6	3	1,822,000	1,507,400	-17.3
Toronto	136	132	32,617,700	37,091,200	+13.7
Windsor	17	18	4,852,200	5,234,500	+ 7.9
Places under 30,000, total	291	287	48,096,900	54,264,900	+12.8

Table 6.--Food Store Chains - Stores and Sales by Provinces and for Cities of 30,000 Population and Over, 1945 and 1946

Province and City	Number of stores		Value of sales		Per cent change
	1945	1946	1945 (1)	1946	
			$	$	
Quebec, Total	166	161	38,251,800	43,476,300	+13.7
Places 30,000 and over, total ...	108	106	28,309,500	32,186,100	+13.7
Hull	1	1	(x)	(x)	
Montreal	84	82	21,305,200	24,265,600	+13.9
Quebec	3	3	(x)	(x)	
Sherbrooke	2	2	(x)	(x)	
Three Rivers	3	3	(x)	(x)	
Verdun	15	15	3,531,400	3,943,100	+11.7
Places under 30,000, total	58	55	9,942,300	11,290,200	+13.6
Maritime Provinces, Total ..	90	90	9,861,500	10,033,400	+ 1.7
Places 30,000 and over, total ...	20	20	3,883,400	4,152,400	+ 6.9
Halifax	18	18	(x)	(x)	
Saint John	2	2	(x)	(x)	
Places under 30,000, total	70	70	5,978,100	5,881,000	- 1.6

(1) In some instances figures for 1945 have been revised.
(x) Indicates figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 7.--Principal Statistics of Food Store Chains Classified by Kind of Business, 1930, and 1941-1946

		All food store chains	Grocery store chains	Combination store chains	Meat market chains
1930 -	No. of chains	87	43	23	21
	No. of stores (average)	2,218	722	1,282	214
	Value of chain sales	$127,582,500	$44,698 400	$ 74,800,200	$8,083,900
	Per cent of all food chain sales	100.0	35.0	58.6	6.4
	Average sales per store	$57,521	$61,909	$58,346	$37,775
1941 -	No. of chains	79	28	34	17
	No. of stores (average)	1,692	446	1,083	163
	Value of chain sales	$177,405,900	$26,523,300	$145,794,100	$5,088,500
	Per cent of all food chain sales	100.0	14.9	82.2	2.9
	Average sales per store	$104,850	$59,469	$134,621	$31,218
1943 -	No. of chains	69	24	32	13
	No. of stores (average)	1,378	382	876	120
	Value of chain sales	$185,974,600	$29,497,700	$150,335,800	$6,141,100
	Per cent of all food chain sales	100.0	15.9	80.8	3.3
	Average sales per store	$134,960	$77,219	$171,616	$51,176
1944 -	No. of chains	67	24	31	12
	No. of stores (average)	1,335	374	854	107
	Value of chain sales	$204,852,500	$31,078,400	$167,732,700	$6,041,400
	Per cent of all food chain sales	100.0	15.2	81.9	2.9
	Average sales per store	$153,448	$83,097	196,408	$56,461
1945 - (1)	No. of chains	66	23	31	12
	No. of stores (average)	1,304	358	843	103
	Value of chain sales	$220,285,300	$34,453,600	$179,216,900	$6,614,800
	Per cent of all food chain sales	100.0	15.6	81.4	3.0
	Average sales per store	$168,930	$96,239	$212,594	$64,221
1946 -	No. of chains	65	23	29	13
	No. of stores (average)	1,262	334	820	108
	Value of chain sales	$245,278,100	$37,018,200	$200,659,100	$7,600,800
	Per cent of all food chain sales	100.0	15.1	81.8	3.1
	Average sales per store	$194,357	$110,833	$256,901	$70,378

(1) In some instances 1945 figures have been revised.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1946

Grocery Store Chains

B. & K. Economy Stores, Ltd.	1490 West Broadway,	Vancouver, B.C.
Capital Grocers Ltd.	133 Garnet St.,	Regina, Sask.
Carroll's Ltd.	19 Hughson St., S.,	Hamilton, Ont.
Cash Foods Ltd.	10316-107th St.,	Edmonton, Alta.
Curry's Grocery Ltd.	6115 Fraser St.,	Vancouver, B.C.
Ford's Groceterias Co., Ltd.	1221 St. James St.,	Montreal, P.Q.
Gowman Grocery, The	181 Colborne St.,	Brantford, Ont.
Heglin, V. J.	211 River St., W.,	Moose Jaw, Sask.
Hickman's Stores	843 Bank St.,	Ottawa, Ont.
Jenkins' Groceteria Ltd.	702-9th Ave., W.,	Calgary, Alta.
Mitchell, Donald	3 Coteau St., W.,	Moose Jaw, Sask.
Model Grocery Ltd.	308-6th St.,	New Westminster, B.C.
O.K. Economy Stores, The	301 Ontario Ave.,	Saskatoon, Sask.
Overwaitea Ltd.	1181 Richards St.,	Vancouver, B.C.
Pinch Stores, The J.C.	536 Queen St., E.,	Sault Ste.Marie, Ont.
Pollock Wholesale Ltd. Sam,	71 Emerald St., S.,	Hamilton, Ont.
Robertson, Ltd., S.M.	Water St.,	Shelburne, N.S.
Steinberg's Wholesale Groceterias Ltd.	5400 Hochelaga St.,	Montreal, P.Q.
Superior Food Stores Ltd.	501 Dominion Bldg.,	Vancouver, B.C.
Thomson Groceries Ltd.	296 Greenwood Ave.,	Toronto, Ont.
Toronto Grocery Stores	290 Queen St., E.,	Toronto, Ont.
Wilbee's Foodland Stores Ltd.	6027 Fraser St.,	Vancouver, B.C.
Ziebell Stores	179 Pembroke St., E.,	Pembroke, Ont.

Combination Store Chains

Acadia Stores Ltd.	245 Hollis St.,	Halifax, N.S.
Braund, Ernest	718 George St.,	Peterborough, Ont.
Cohen, Louis	134 Sterling Road,	Glace Bay, N.S.
Consumers Co-operative Society Ltd. The	114 Algonquin Blvd.,	Timmins, Ont.
Cosmopolitan Stores, The	214 Townsend St.,	Sydney, N.S.
Curtis Markets,	1028 Pape Ave.,	Toronto, Ont.
David's Market Ltd.	106 Townsend St.,	Sydney, N.S.
Dionne Ltée.	1221 St.Catherine St.,W.,	Montreal, P.Q.
Dominion Stores Ltd.	832 Old Weston Rd.,	Toronto, Ont.
Eaton Co. Ltd. The T.		Toronto, Ont.
Fitzpatrick & Geraghty Ltd.	198 Rubidge St.,	Peterborough, Ont.
Five United Markets Ltd.	552 Pitt St., W.,	Windsor, Ont.
Great A. & P. Tea Co. Ltd. The	135 Laughton Ave.,	Toronto, Ont.
International Provision Co. Ltd.	626 Barrington St.,	Halifax, N.S.
Jewel Stores Ltd.	288 Princess St.,	Winnipeg, Man.
Loblaw Groceterias Co. Ltd.	Fleet & Bathurst Sts.,	Toronto, Ont.
Mason Stores, The E.F.	433 George St.,	Peterborough, Ont.
Powell & Co. Ltd.	King & Main Sts.,	Dundas, Ont.
Power Food Markets,	118 King St., E.,	Toronto, Ont.
Ray's Limited	501 Dominion Bldg.,	Vancouver, B.C.
Safeway Stores Ltd.	Box 660,	Oakland, California, U.S.A.
Shop-Easy Stores Ltd.	203 Confederation Life Bldg.,	Winnipeg, Man.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1945 (Concl'd.)

Grocery Store Chains (Cont'd.)

Schwartz & Sons, D.	115 London St.,	Windsor, Ont.
Shore's Chain Stores	Main St.,	Glace Bay, N.S.
Sobey's Stores Ltd.	Main St.,	Stellarton, N.S.
Thrift Stores, Ltd.	960 Outremont Ave.,	Montreal, P.Q.
Whyte Packing Co. Ltd. The	78 Linton Ave.,	Stratford, Ont.
Workers' Co-operative of New Ontario, Ltd.	64-3rd Ave.,	Timmins, Ont.
Thomson's Food Markets	8 Ontario St.,	St.Catharines, Ont.

Meat Market Chains

Buehler Bros. Ltd.	2896 Dundas St., W.,	Toronto, Ont.
Collins Ltd. Len	475 Danforth Ave.,	Toronto, Ont.
Cooper Ltd. Joseph	1018 Bloor St.,	Toronto, Ont.
Cross' Stores Ltd.	1310 Douglas St.,	Victoria, B.C.
Duff's Meat Stores	73 King St.,	Hamilton, Ont.
Johnson Markets, S.E.	2657 Commercial Drive,	Vancouver, B.C.
Minor's Meat Markets	2130 Albert St.,	Regina, Sask.
Home Service Meat Markets	815 W. Hastings St., Room 112.	Vancouver, B.C.
O.K. Stores, Ltd.	501 Dominion Bldg.,	Vancouver, B.C.
Poyntz, A.	790 St. Clair Ave., W.,	Toronto, Ont.
Pure Food Meat Markets	203 First Ave.,	Toronto, Ont.
Sterling Food Markets Ltd.	18 West Hastings St.,	Vancouver, B.C.
Swanwick, A.	428 King St., W.,	Hamilton, Ont.

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DOMINION BUREAU OF STATISTICS

MERCHANDISING AND SERVICES SECTION

OTTAWA, CANADA

RETAIL FOOD STORE CHAINS

COMPRISING

GROCERY STORES

COMBINATION STORES

MEAT MARKETS

1947

Price 25 cents

January 1949

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DEFINITIONS

Chains

For the purpose of this survey, a retail chain is an organization operating four or more retail stores under the same ownership.

Chain classification

A chain is classified according to the kind of business carried on by the majority of its stores. The chains included in this report are the three principal types of food stores - grocery, combination grocery and meat, and meat markets. Due to the broader chain classification it follows that some combination type chains may operate some strictly grocery stores. In a few instances food chains operate stores entirely outside of the food classification, such as a general store.

Stores - average

The average number of stores operated is obtained by averaging the number in operation at January 1st, June 30 and December 31st.

Maximum

The maximum number is the total number of stores operated throughout the year, whether continuous or part year.

Sales

Net retail sales are gross sales less any returns or allowances. Sales at wholesale are not included.

Salaries and wages

Salaries and wages shown in this report are those paid to store employees only as comparable to store sales. Salaries and wages paid to head office and warehouse employees are not included.

Accounts outstanding

This represents the amounts owing on charge, instalment or open accounts at the end of the year. It does not include any accounts written off.

Stocks

The inventory of stocks on hand at the end of the year in both stores and warehouses is at cost or invoice value.

DOMINION BUREAU OF STATISTICS

MERCHANDISING AND SERVICES SECTION

OTTAWA

Dominion Statistician: HERBERT MARSHALL
Director, Industry and Merchandising Division: W.H. Losee
Chief, Merchandising and Services Section: C.H. McDonald

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RETAIL FOOD STORE CHAINS, 1947

The Dominion Bureau of Statistics conducts an annual survey on the operation of retail chains of which retail food store chains form a part. The results of this survey yield figures on retail chain food store sales, salaries and wages paid to store employees, accounts outstanding at the end of the year and store and warehouse inventories at the end of the year. Reports are received from all known firms coming within the definition of a chain giving this study complete coverage. While forming part of a general report on retail chains, information on retail food stores in the chain category is presented here in considerably more detail than in the comprehensive report on chain stores, "Retail Chains in Canada, 1947". This latter bulletin will be made available shortly. As explained in the definitions, the food chains whose results comprise this report are the three major food classifications i.e., grocery stores, combination stores and meat markets.

Summary

1. Comparison with previous years:

In 1947 there were 64 retail food chains operating 1,301 stores the sales from which amounted to $308,826,700. This represented an increase of 26 per cent in sales from the previous year. The greatest increase over 1946 in any item presented in this report was made in warehouse stocks, 34.8 per cent. The introduction and growth of the "super market" type of food chain store is evidenced in average sales per store which rose from $45,041 in 1933 to $244,906 in 1947 representing an increase of 444 per cent. While some of this increase may be attributed to price changes, there is no doubt that retailing units of food chains have become larger in volume of business handled. (Table 1).

A comparison in the trends of total dollar volume is shown in the chart on page 6 and of average dollar volume per store in the chart on page 7.

2. Provincial comparison:

All regions of the country shared in the sales increase, ranging from 13 per cent in Saskatchewan to 29 per cent in Ontario. No major change in number to stores operated in the provinces was recorded. (Table 2).

3. Chains classed by number of units and size:

One chain dropped from the "100 units and over" class to the next lower unit-number bracket but the proportion of sales done by the largest range did not change materially. Increased dollar volume of business brought the number of chains doing over $1,000,000 in 1947 to 24 from 20 in 1946. These large firms increased the proportion of food chain business for that group to 94.2 per cent compared to 91.7 per cent in the previous year and 85.8 per cent in 1941. (Tables 3 and 4).

4. Stores classed by size:

The "super-market" type of new chain food stores is again brought out in comparison of store size. In 1947, 165 stores were over $500,000 sales volume as compared to 96 the previous year. In 1945 the number was 62. Part of this upward shifting may be the natural result of a general increase in dollar volume but the building of new stores of the large type is now being evidenced. This group of large stores accounted for 40 per cent of the food chain business in 1947 - (25.5 per cent in 1946). (Table 5).

5. Locality distribution of sales:

In the Prairie provinces and the Maritimes food chains made greater increases in sales volume in cities over 30,000 population than they did in places under 30,000. In British Columbia, Ontario, and Quebec, greater increases in dollar volume of sales were made in places under 30,000 population. Ontario towns and villages registered the greatest increases over 1946 (33.4 per cent). (Table 6).

6. Kind of business composition:

The 64 chain firms included in this report were comprised of 19 grocery chains, 32 combination type chains and 13 meat market chains. Exclusion of some firms as chains from the grocery classification and the addition of new firms as combination grocery and meat chains resulted in an increase in the percentage of business done by combination chains. (Table 7).

According to classification, chain firms are classified by the kind of business carried on in the majority of stores. In the food field, it is common for some grocery firms to operate stores where a considerable proportion of fresh meat is sold (over 20% to be classed as a combination store). Likewise many combination chains operate stores where very little or no fresh meat is sold. The individual units operated by these two types of food chains in 1947 were as follows:

Grocery and Combination units operated by Grocery and Combination Chains, 1947

Kind of Business	Total Units		Grocery Units		Combination Units	
	Number	Sales	Number	Sales	Number	Sales
		$		$		$
Grocery chains (1) .	299	25,394,200	282	22,488,400	15	2,850,200
Combination chains (2) .	860	275,539,000	226	27,484,300	629	247,694,200

(1) Includes 2 stores with $55,600 sales not classed as grocery or combination.
(2) Includes 5 stores with $360,500 sales not classed as grocery or combination.

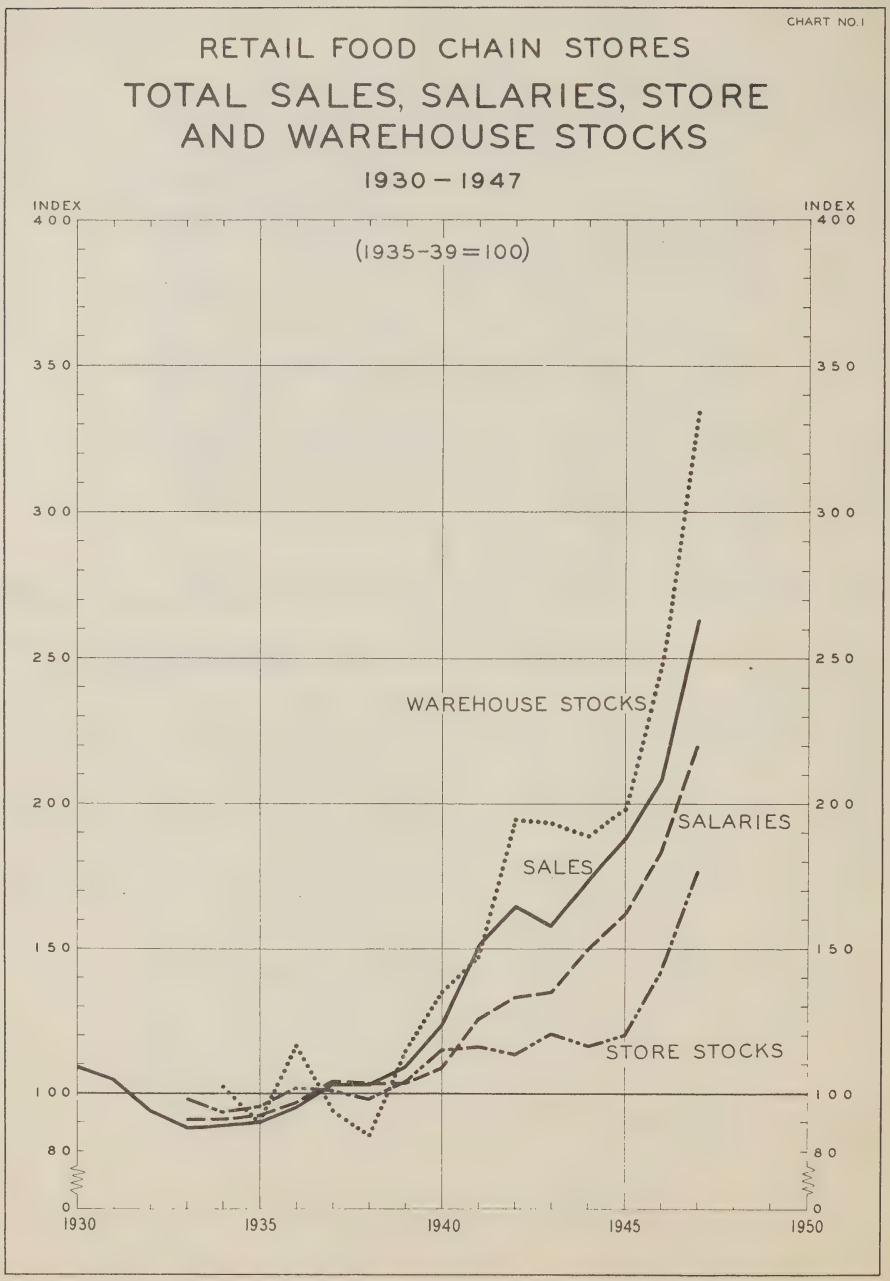
CHART NO. I
RETAIL FOOD CHAIN STORES
TOTAL SALES, SALARIES, STORE AND WAREHOUSE STOCKS
1930 – 1947
INDEX
INDEX
(1935-39=100)
400
350
300
250
200
150
100
80
0
WAREHOUSE STOCKS
SALARIES
SALES
STORE STOCKS
1930
1935
1940
1945
1950

CHART NO. 2

RETAIL FOOD CHAIN STORES
AVERAGE SALES, SALARIES AND STOCKS PER STORE
1930 – 1947

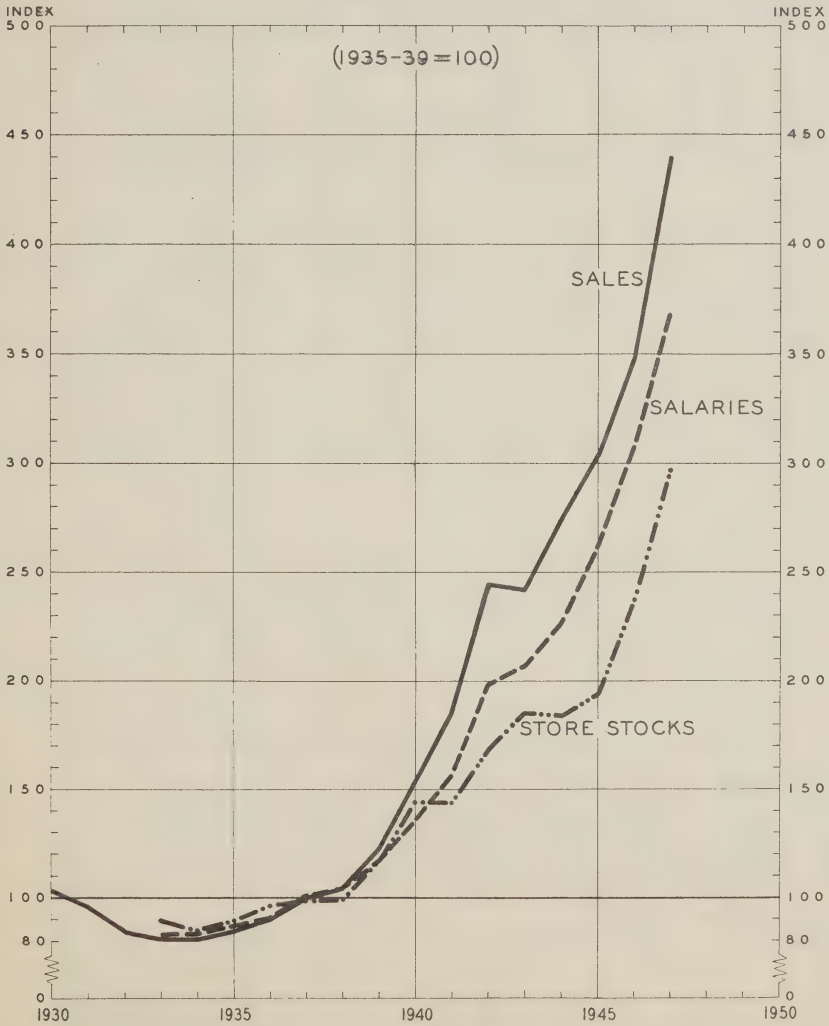

Table 1.--Summary of Food Store Chains, 1930-1947

Year	Number of Chains	Number of Stores		Retail Sales		Salaries and Wages to Store Employees	Accounts Outstanding End of Year	Stocks on Hand End of Year	
		Average(1)	Maximum	Amount	Average per Store			Stores	Warehouses
				$	$	$	$	$	$
1930 ..	87	2,218	2,352	127,582,500	57,521	9,801,400	(a)	6,468,600	(a)
1931 ..	90	2,310	2,410	123,753,000	53,573	(a)	(a)	(a)	(a)
1932 ..	90	2,347	2,436	109,814,400	46,789	(a)	(a)	(a)	(a)
1933 ..	91	2,301	2,398	103,638,500	45,041	7,976,000	(a)	6,221,500	(a)
1934 ..	86	2,310	2,395	104,912,800	45,417	7,958,200	(a)	5,894,500	4,011,700
1935 ..	86	2,241	2,309	105,535,900	47,138	8,094,500	1,172,300	6,046,900	3,530,600
1936 ..	89	2,229	2,334	111,511,900	50,028	8,441,900	1,261,300	6,474,300	4,534,000
1937 ..	89	2,179	2,287	121,054,800	55,555	9,138,800	1,351,900	6,435,000	3,679,400
1938 ..	91	2,093	2,212	121,371,500	57,989	9,080,800	1,601,400	6,238,100	3,349,000
1939 ..	87	1,867	2,044	127,945,900	68,530	9,072,300	1,473,500	6,604,900	4,485,700
1940 ..	82	1,684	1,817	145,193,900	86,220	9,545,900	1,366,600	7,322,100	5,276,300
1941 ..	79	1,692	1,707	177,405,900	103,928	11,056,400	1,088,000	7,386,800	5,758,900
1942 ..	70	1,416	1,431	193,488,500	136,644	11,664,800	(a)	7,168,300	7,591,200
1943 ..	69	1,378	1,394	185,974,600	134,960	11,833,800	740,200	7,669,300	7,553,300
1944 ..	67	1,335	1,364	204,852,500	153,448	13,134,300	733,200	7,393,000	7,397,700
1945 ..	66	1,304	1,325	220,285,300	168,930	14,191,200	708,600	7,631,600	7,744,900
1946 ..	65	1,262	1,289	245,278,100	194,357	16,108,800	764,700	9,017,600	9,705,300
1947 ..	64	1,261	1,301	308,826,700	244,906	19,294,700	881,500	11,271,300	13,080,900

(1) Obtained by averaging the number at the beginning, middle and end of year.
(a) Not available.

Table 2.-- Principal Statistics of Food Store Chains by Provinces

(Grocery, combination and meat market chains combined)

		1930	1941	1946	1947	Per cent change in sales 1946-1947
CANADA, TOTAL	Chains ...	87	79	65	64	
	Stores ...	2,352	1,707	1,289	1,301	
	Sales	$127,582,500	$177,405,900	$245,278,100	$308,826,700	+25.9
British Columbia(1)	Chains ...	19	14	13	12	
	Stores ...	246	282	220	223	
	Sales	$ 10,194,900	$ 18,765,300	$ 28,037,600	$ 33,205,300	+18.4
Alberta	Chains ...	8	8	4	3	
	Stores ...	120	103	78	76	
	Sales	$ 5,587,000	$ 7,932,100	$ 12,027,700	$ 13,762,400	+14.4
Saskatchewan	Chains ...	10	4	6	6	
	Stores ...	165	111	77	76	
	Sales	$ 6,969,300	$ 6,794,100	$ 9,874,700	$ 11,177,200	+13.2
Manitoba	Chains ...	8	4	4	4	
	Stores ...	121	85	62	64	
	Sales	$ 5,689,100	$ 8,247,500	$ 13,220,200	$ 15,890,900	+20.2
Ontario	Chains ...	37	41	34	33	
	Stores ...	1,107	790	601	598	
	Sales	$ 70,769,300	$ 99,318,600	$128,608,200	$166,142,100	+29.2
Quebec	Chains ...	13	7	7	9	
	Stores ...	495	214	161	170	
	Sales	$ 23,708,400	$ 28,477,200	$ 43,476,300	$ 55,953,100	+28.7
Maritime Provinces	Chains ...	12	14	10	11	
	Stores ...	98	122	90	94	
	Sales	$ 4,664,500	$ 7,871,100	$ 10,033,400	$ 12,695,700	+26.5

(1) Includes Yukon and Northwest Territories.

Table 3.--Food Store Chains Classified According to Number of Stores Operated, 1941, 1945-1947

(Grocery, combination and meat market chains combined)

Number of units	1941				1945			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	79	1,707	177,405,900	100.0	66	1,325	220,285,300	100.0
Less than 10 units	56	318	21,331,200	12.0	47	251	23,552,500	10.7
10-99 units	19	602	34,103,000	19.2	15	448	44,316,000	20.1
100 units and over	4	787	121,971,700	68.8	4	626	152,416,800	69.2

Number of units	1946				1947			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	65	1,289	245,278,100	100.0	64	1,301	308,826,700	100.0
Less than 10 units	46	247	25,214,100	10.3	45	239	28,009,700	9.1
10-99 units	14	393	46,249,900	18.9	15	441	58,640,100	19.0
100 units and over	5	649	173,814,100	70.8	4	621	222,176,900	71.9

Table 4.--Food Store Chains Classified According to Amount of Annual Sales, 1941, and 1945-1947

(Grocery, combination and meat market chains combined)

Annual sales	1941				1945			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	79	1,707	177,405,900	100.0	66	1,325	220,285,300	100.0
$1,000,000 and over	14	1,154	152,322,200	85.8	18	1,044	199,273,300	90.4
$ 500,000 - $999,999	21	285	14,859,600	8.4	16	126	11,719,900	5.3
$ 300,000 - $499,999	13	96	5,061,700	2.9	12	61	4,977,500	2.3
$ 200,000 - $299,999	13	86	3,059,900	1.7	13	62	3,312,300	1.5
Less than $200,000	18	86	2,102,500	1.2	7	32	1,002,300	0.5

Annual sales	1946				1947			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			$				$	
All food chains, Total	65	1,289	245,278,100	100.0	64	1,301	308,826,700	100.0
$1,000,000 and over	20	1,015	225,039,700	91.7	24	1,074	290,857,200	94.2
$ 500,000 - $999,999	18	139	12,638,800	5.2	16	108	10,893,500	3.5
$ 300,000 - $499,999	13	73	4,978,200	2.0	12	66	4,885,700	1.6
$ 200,000 - $299,999	5	24	1,241,700	0.5	4	18	993,900	0.3
Less than $200,000	9	38	1,379,700	0.6	8	35	1,196,400	0.4

Table 5.--Food Store Chain Units Classified by Size of Business, 1946 and 1947

(Grocery, combination and meat market chains combined)

Annual sales	1946				1947			
	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent
		$				$		
All food chains, Total	1,289	245,278,100	100.0	-	1,301	308,826,700	100.0	-
$500,000 and over	96	62,521,000	25.5	25.5	165	123,864,700	40.1	40.1
$300,000 - $499,999	175	67,356,900	27.4	52.9	194	75,646,600	24.5	64.6
$200,000 - $299,999	171	42,372,700	17.3	70.2	161	39,812,900	12.9	77.5
$100,000 - $199,999	273	39,475,600	16.1	86.3	268	38,705,100	12.5	90.0
$ 50,000 - $ 99,999	376	26,341,600	10.8	97.1	345	25,361,800	8.2	98.2
$ 30,000 - $ 49,999	147	6,095,200	2.5	99.6	108	4,473,300	1.5	99.7
$ 20,000 - $ 29,999	30	793,100	0.3	99.9	23	605,800	0.2	99.9
$ 10,000 - $ 19,999	12	174,700	0.1	100.0	19	259,300	0.1	100.0
Less than $10,000	9	57,300	(a)	-	18	97,200	(a)	-

(a) Less than 0.05 per cent.

Note - Small size units may represent stores operated part year.

Table 6.--Food Store Chains - Stores and Sales by Provinces and for Cities of 30,000 Population and Over, 1946 and 1947

Province and City	Number of stores		Value of sales		Per cent change
	1946	1947	1946	1947	
			$	$	
CANADA, Total	1,289	1,301	245,278,100	308,826,700	+25.9
Places 30,000 and over, total	727	744	156,071,300	194,814,500	+24.8
Places under 30,000, total	562	557	89,206,800	114,012,200	+27.8
British Columbia, Total	220	223	28,037,600	33,205,300	+18.4
Places 30,000 and over, total	137	141	17,813,100	21,033,600	+18.1
Vancouver	126	127	15,168,100	17,861,900	+17.8
Victoria	11	14	2,645,000	3,171,700	+19.9
Places under 30,000, total	83	82	10,224,500	12,171,700	+19.0
Alberta, Total	78	76	12,027,700	13,762,400	+14.4
Places 30,000 and over, total	51	52	8,502,600	9,928,700	+16.8
Calgary	38	40	5,374,900	(x)	(x)
Edmonton	13	12	3,127,700	(x)	(x)
Places under 30,000, total	27	24	3,525,100	3,833,700	+ 8.8
Saskatchewan, Total	77	76	9,874,700	11,177,200	+13.2
Places 30,000 and over, total	29	29	5,045,200	5,981,000	+18.5
Regina	19	19	(x)	(x)	(x)
Saskatoon	10	10	(x)	(x)	(x)
Places under 30,000, total	48	47	4,829,500	5,196,200	+ 7.6
Manitoba, Total	62	64	13,220,200	15,890,900	+20.2
Places 30,000 and over, total	45	47	9,248,100	11,228,700	+21.4
Winnipeg	45	47	9,248,100	11,228,700	+21.4
Places under 30,000, total	17	17	3,972,100	4,662,200	+17.4
Ontario, Total	601	598	128,608,200	166,142,100	+29.2
Places 30,000 and over, total	332	335	76,922,100	97,172,900	+26.3
Brantford	11	12	1,654,700	2,119,400	+28.1
Fort William	7	6	1,277,700	1,528,400	+19.6
Hamilton	78	79	8,835,600	11,140,900	+26.1
Kingston	4	3	1,556,300	1,945,500	+25.0
Kitchener	4	5	1,831,200	2,692,900	+47.1
London	11	11	3,714,100	4,802,500	+29.3
Ottawa	35	35	8,743,300	10,831,500	+23.9
Peterborough	18	18	2,638,800	3,337,800	+26.5
St. Catherines	11	11	2,897,300	3,693,200	+27.5
Sudbury	3	3	1,507,400	2,225,100	+47.6
Toronto	132	136	37,091,200	45,790,500	+23.5
Windsor	18	16	5,234,500	7,065,200	+35.0
Places under 30,000, total	269	263	51,686,100	68,969,200	+33.4

Table 6.--Food Store Chains - Stores and Sales by Provinces and for Cities of 30,000 Population and Over, 1946 and 1947 - Concl.

Province and City	Number of stores		Value of sales		Per cent change
	1946	1947	1946	1947	
			$	$	
Quebec, Total	161	170	43,476,300	55,953,100	+28.7
Places 30,000 and over, total ...	113	120	34,476,300	44,151,100	+28.1
Hull	1	1	(x)	(x)	(x)
Montreal	82	87	24,265,600	31,026,400	+27.9
Outremont	7	7	2,201,700	2,755,200	+25.1
Quebec	3	4	(x)	(x)	(x)
Sherbrooke	2	2	(x)	(x)	(x)
Three Rivers	3	3	(x)	(x)	(x)
Verdun	15	16	3,943,100	5,363,600	+36.0
Places under 30,000, total	48	50	9,088,500	11,802,000	+29.9
Maritime Provinces, Total ..	90	94	10,033,400	12,695,700	+26.5
Places 30,000 and over, total ...	20	20	4,152,400	5,318,500	+28.1
Halifax	18	18	(x)	(x)	(x)
Saint John	2	2	(x)	(x)	(x)
Places under 30,000, total	70	74	5,881,000	7,377,200	+25.4

(x) Indicates figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 7.--Principal Statistics of Food Store Chains Classified by Kind of Business, 1930, and 1941-1947

	All food store chains	Grocery store chains	Combination store chains	Meat market chains
1930 - No. of chains	87	43	23	21
No. of stores (average)	2,218	722	1,282	214
Value of chain sales	$127,582,500	$44,698,400	$ 74,800,200	$8,083,900
Per cent of all food chain sales	100.0	35.0	58.6	6.4
Average sales per store	$57,521	$61,909	$58,346	$37,775.
1941 - No. of chains	79	28	34	17
No. of stores (average)	1,692	446	1,083	163
Value of chain sales	$177,405,900	$26,523,300	$145,794,100	$5,088,500
Per cent of all food chain sales	100.0	14.9	82.2	2.9
Average sales per store	$104,850	$59,469	$134,621	$31,218
1945 - No. of chains	66	23	31	12
No. of stores (average)	1,304	358	843	103
Value of chain sales	$220,285,300	$34,453,600	$179,216,900	$6,614,800
Per cent of all food chain sales	100.0	15.6	81.4	3.0
Average sales per store	$168,930	$96,239	$212,594	$64,221
1946 - No. of chains	65	23	29	13
No. of stores (average)	1,262	334	820	108
Value of chain sales	$245,278,100	$37,018,200	$200,659,100	$7,600,800
Per cent of all food chain sales	100.0	15.1	81.8	3.1
Average sales per store	$194,357	$110,833	$256,901	$70,378
1947 - No. of chains	64	19	32	13
No. of stores (average)	1,261	299	860	102
Value of chain sales	$308,826,700	$25,394,200	$275,539,000	$7,893,500
Per cent of all food chain sales	100.0	8.2	89.2	2.6
Average sales per store	$244,906	$84,930	$320,394	$77,387

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1947

Grocery Store Chains

B. & K. Economy Stores Ltd.	1490 West Broadway	Vancouver, B.C.
Capital Grocers Ltd.	1333 Garnet St.	Regina, Sask.
Carroll's Ltd.	19 Hughson St. S.	Hamilton, Ont.
Curry's Grocery Ltd.	6115 Fraser St.	Vancouver, B.C.
Ford's Groceterias Co. Ltd.	1221 St. James St.	Montreal, P.Q.
Gowman Grocery, The	181 Colborne St.	Brantford, Ont.
Heglin, V. J.	211 River St. W.	Moose Jaw, Sask.
Hickman's Stores	843 Bank St.	Ottawa, Ont.
Jenkins' Groceteria Ltd.	702-9th Ave. W.	Calgary, Alta.
Mitchell, Donald	3 Coteau St. W.	Moose Jaw, Sask.
O.K. Economy Stores, The	301 Ontario Ave.	Saskatoon, Sask.
Overwaitea Ltd.	1181 Richards St.	Vancouver, B.C.
Pinch Stores, The J.C.	536 Queen St. E.	Sault Ste.Marie, Ont.
Pollock Wholesale Ltd., Sam	71 Emerald St. S.	Hamilton, Ont.
Robertson Ltd., S.M.	Water St.	Shelburne, N.S.
Superior Food Stores Ltd.	501 Dominion Bldg.	Vancouver, B.C.
Thomson Groceries Ltd.	296 Greenwood Ave.	Toronto, Ont.
Toronto Grocery Stores	290 Queen St. E.	Toronto, Ont.
Wilbee's Foodland Stores Ltd.	6027 Fraser St.	Vancouver, B.C.

Combination Store Chains

Acadia Stores Ltd.	245 Hollis St.	Halifax, N.S.
Bélanger & Cie, E.	1977 Frontenac St.	Montreal, P.Q.
Braund, Ernest	718 George St.	Peterborough, Ont.
Campbellton Cash and Carry Stores	88 Water St.	Campbellton, N.B.
Canada Safeway Ltd.	1425 Standard Bldg.	Vancouver, B.C.
Carload Groceteria	82 Geary Ave.	Toronto, Ont.
Cohen, Louis	134 Sterling Road	Glace Bay, N.S.
Consumers Co-operative Society Ltd., The	114 Algonquin Blvd.	Timmins, Ont.
Cosmopolitan Stores, The	214 Townsend St.	Sydney, N.S.
Curtis Markets	1028 Pape Ave.	Toronto, Ont.
David's Market Ltd.	106 Townsend St.	Sydney, N.S.
Dionne Ltée.	1221 St.Catherine St. W.	Montreal, P.Q.
Dominion Stores Ltd.	832 Old Weston Rd.	Toronto, Ont.
Eaton Co. Ltd., The T.		Toronto, Ont.
Fitzpatrick & Geraghty Ltd.	198 Rubidge St.	Peterborough, Ont.
Great A. & P. Tea Co. Ltd., The	135 Laughton Ave.	Toronto, Ont.
International Provision Co. Ltd.	626 Barrington St.	Halifax, N.S.
Jewel Stores Ltd.	288 Princess St.	Winnipeg, Man.
Loblaw Groceterias Co. Ltd.	Fleet & Bathurst Sts.	Toronto, Ont.
Mason Stores, The E.F.	433 George St.	Peterborough, Ont.
Powell & Co. Ltd.	King & Main Sts.	Dundas, Ont.
Power Food Markets	118 King St. E.	Toronto, Ont.
Ray's Limited	501 Dominion Bldg.	Vancouver, B.C.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1947 (Concl'd.)

Combination Store Chains (Concl'd.)

Schwartz & Sons, D.	1545 London St.	Windsor, Ont.
Shop-Easy Stores Ltd.	203 Confederation Life Bldg.	Winnipeg, Man.
Shore's Chain Stores	71 Main St.	Glace Bay, N.S.
Sobey's Stores Ltd.	King St.	Stellarton, N.S.
Steinberg's Wholesale Groceterias Ltd.	5400 Hochelaga St.	Montreal, P.Q.
Thomson's Food Markets	8 Ontario St.	St.Catharines, Ont.
Thrift Stores Ltd.	960 Outremont Ave.	Montreal, P.Q.
Whyte Packing Co. Ltd., The	78 Linton Ave.	Stratford, Ont.
Workers' Co-operative of New Ontario Ltd.	64-3rd Ave.	Timmins, Ont.

Meat Market Chains

Buehler Bros. Ltd.	2896 Dundas St. W.	Toronto, Ont.
Collins Ltd., Len	475 Danforth Ave.	Toronto, Ont.
Cooper Ltd., Joseph	1018 Bloor St.	Toronto, Ont.
Cross' Stores Ltd.	1310 Douglas St.	Victoria, B.C.
Duff's Meat Stores	73 King St.	Hamilton, Ont.
Home Service Meat Markets	815 W. Hastings St. Room 112.	Vancouver, B.C.
Johnson Markets, S.E.	2657 Commercial Drive	Vancouver, B.C.
Minor's Meat Markets	2130 Albert St.	Regina, Sask.
O.K. Stores Ltd.	501 Dominion Bldg.	Vancouver, B.C.
Poyntz, A.	790 St. Clair Ave. W.	Toronto, Ont.
Pure Food Meat Markets	203 First Ave.	Toronto, Ont.
Sterling Food Markets Ltd.	18 West Hastings St.	Vancouver, B.C.
Swanwick, A.	428 King St. W.	Hamilton, Ont.